SPECIAL EDITION

USING® WordPerfect® Office X3

THE *ONLY* **WORDPERFECT** BOOK YOU NEED

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Laura Acklen and Read Gilgen

SPECIAL EDITION

USING WordPerfect Office X3

Laura Acklen

Read Gilgen

Pearson Education
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Special Edition Using WordPerfect Office X3

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About the Authors

Laura Acklen first encountered WordPerfect 4.2 in early 1988 when she developed custom courseware and trained law offices that were converting from Wang systems to Novell LANs. In 1990, she began teaching classes for the international training company, Productivity Point International (PPI), and progressed into courseware development for its corporate headquarters. Her student and instructor manuals were distributed internationally and used in all PPI training centers.

In 1993, Laura wrote her first book for Que, called *Oops! What to Do When Things Go Wrong with WordPerfect*. Since that time, she has authored or co-authored thirteen other books for Que, including six editions of the *Special Edition Using WordPerfect* books (for versions 6, 6.1, 7, 9, 10, and 12) and four editions of the *Absolute Beginner's Guide to WordPerfect* (for versions 10, 11, 12, and X3).

Laura was a contributing editor for the *WordPerfect for Windows Magazine* for four years. She wrote the monthly "Basics" column for the first year before switching over to the "Troubleshooting" column, which also appeared in every issue. Laura is currently writing articles and tutorials for Corel's monthly e-newsletter, "The WordPerfect Expert."

Laura enjoys cooking, swimming, biking, and scuba diving. She lives in Austin, Texas with her husband Jeff and their three children. The WPWriter.com Web site was created after the release of *Special Edition Using WordPerfect 9* and now boasts the largest collection of WordPerfect tips on the Web. There are also articles, links to other WP resources, and a page with links to updates and patches.

Read Gilgen completed his B.A. at Brigham Young University and his M.A. and Ph.D. in Latin American literature and linguistics at the University of California, Irvine. He taught Spanish at the University of North Carolina, Chapel Hill and at the University of Wisconsin before becoming director of UW's L&S Learning Support Services (the language labs) in 1981.

His professional interests include instructional technology in higher education, especially in foreign language education. He is a past president of the International Association for Language Learning Technology.

He has taught and written extensively on DOS, Windows, and WordPerfect since the early 1980s, having first used version 2.3 of WordPerfect. He is author of Que's *WordPerfect for Windows Hot Tips*, contributing author to several Que books including the Special Editions of *Using WordPerfect* (both *DOS* and *Windows* since version 5.1), co-author of *Using Corel WordPerfect Suite 8*, and co-author of *Special Edition Using WordPerfect (versions 9–12)*. He also wrote *Absolute Beginner's Guide to Microsoft PowerPoint 2003* for Que.

Most of his spare time is spent with his best friend and wife, Sue. Together they are also heavily involved in church leadership. When he can find the time, he also enjoys singing and acting.

Dedication

From Laura:

To my children, Ben, Lindsey, and Sarah, who help me remember that some days are meant to be spent playing outside.

From Read:

To my wife, Sue, a talented and creative artist in her own right, for her unending and loving support.

From Laura and Read:

To all the loyal and new WordPerfect users who refuse to follow the uneducated masses, insisting instead on using the best word processing program available. We hope this book helps you confidently keep the faith.

Acknowledgments

Read and I would like to thank everyone who helped bring this book to fruition. Stephanie McComb, our acquisitions editor, is such a pleasure to work with that we actually enjoyed the process of negotiating contracts and submission dates. And as usual, Sharry Lee Gregory made sure nothing vitally important (like our checks) slipped through the cracks.

We want to thank the folks at Corel who helped us sort through the questions we had about WordPerfect Office X3. A special thanks goes to Cindy Howard, program manager for WordPerfect Office, who acted as our point person and never failed to provide the answers and information we asked for.

We also gratefully acknowledge the kind and generous support of the Corel C-Techs and other volunteers on the Corel newsgroups. They spend countless hours answering questions and troubleshooting problems. They don't quit until they find a solution, or track down the source of the difficulty, and they should all be commended for their patience and perseverance.

Last, but not least, we want to extend a warm thanks to our friends on WordPerfect Universe. The talent pool on that site is nothing short of amazing. We were fortunate to tap once again into that talent and recruited one of the best to do the technical edit on this book. Thanks to Cyndy Zook for her attention to detail, and for the friendly and helpful comments she made.

From Laura:

I could not ask for a more understanding and supportive family. They try not to roll their eyes when I promise that this project won't be as time-consuming as the last one. I especially want to thank my husband, Jeff, for doing more than his share of the chores, and for managing the children on the weekends so I could hide in my office and work. I also want to extend my warmest thanks to my writing partner, Read. We're a great team and I'm thrilled we were able to work together again on this revision. I hope we are still doing this when WordPerfect Office 20XX comes out!

From Read:

No acknowledgment would be complete without thanking those closest to you who support you when you've gone into hiding to write. My wife, Sue, is always supportive, recognizing when it's time to yank me out of the basement to watch a movie (or shovel some snow!). I probably should also acknowledge my grandkids who made taking on this project necessary (so I can retire closer to them). Finally, I was delighted to have the chance to work once again with Laura on this revision project. Not only is she a great team leader, but she's also a good friend. It's fun working with someone who's as excited about WordPerfect as I am.

We Want to Hear from You!

As the reader of this book, *you* are our most important critic and commentator. We value your opinion and want to know what we're doing right, what we could do better, what areas you'd like to see us publish in, and any other words of wisdom you're willing to pass our way.

As a publisher for Que Publishing, I welcome your comments. You can e-mail or write me directly to let me know what you did or didn't like about this book—as well as what we can do to make our books better.

Please note that I cannot help you with technical problems related to the topic of this book. We do have a User Services group, however, where I will forward specific technical questions related to the book.

When you write, please be sure to include this book's title and author as well as your name, e-mail address, and phone number. I will carefully review your comments and share them with the author and editors who worked on the book.

E-mail: feedback@quepublishing.com

Mail: Greg Wiegand
Publisher
Que Publishing
800 East 96th Street
Indianapolis, IN 46240 USA

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INTRODUCTION

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If you're looking at this book, it means you've either purchased WordPerfect Office, or you're seriously thinking about it. Good for you! WordPerfect is without a doubt the most powerful, customizable, and easy-to-use program that you can get your hands on. Period. WordPerfect lets you work the way you want to work, not the way the programmers want you to work.

File compatibility with Microsoft Word and other Microsoft applications has been enhanced to the point where document migration is virtually seamless, so it no longer matters what your clients and associates are using. What does matter is that you have a choice. WordPerfect Office X3 is the most cost-effective of all the available office applications, delivering more features, more flexibility, and more compatibility than any other suite on the market.

Don't let the size of the book intimidate you. We won't bore you with minute details of every little feature. Who has time for that? No, this book is crammed full of tips, tricks, and practical examples that you won't find anywhere else. We explain what a feature is, but more importantly, we tell you why you want to use it. What's in it for you? How can it save you time? What features can be used together to achieve a higher level of productivity? All this and more…just waiting for you to start turning the pages.

Who Should Buy This Book?

If you've used a word processor before, and you want to learn how to take advantage of all that WordPerfect has to offer, this book is for you. We made a few assumptions about our audience when we developed the outline for this book. We decided that most of you already know the basics of creating and formatting documents, even if you've done the work in another application. Many of you have used a previous version of WordPerfect, so your interest lies not only in the new features, but also in how you might use the familiar features more effectively.

New Features and Enhancements in WordPerfect Office X3

This version of WordPerfect Office includes some very exciting new features and some welcome improvements that speed up navigation and formatting. You might notice that the list of new features isn't as lengthy as it has been in previous versions. Corel decided to focus instead on addressing known issues, improving on the existing feature set, and producing a reliably stable product. Who can argue with that?

WordPerfect Office X3 boasts suite-wide improvements and also new features and enhancements in WordPerfect, Quattro Pro, and Presentations. Here are some highlights:

WordPerfect Office X3 Suite-wide Improvements

- The first thing you will notice about WordPerfect Office X3 is the clean, new look. Windows XP built-in themes are now supported in the updated toolbars, dialogs, and controls of WordPerfect X3, Quattro Pro X3, and Presentations X3, so you can change the options to fit the settings that appeal to you.
- The WordPerfect Office X3 Migration Manager easily moves your macros, templates, and other settings from an earlier version of WordPerfect Office. Now enhanced for network deployment and large-scale installations, the WordPerfect Office X3 Migration Manager will allow you to import WordPerfect Office 12, WordPerfect Office 11, or WordPerfect Office 2002 settings and files. Alternatively, IT managers can customize a command line that lets you upgrade to WordPerfect Office X3 by migrating your settings from a previous version of WordPerfect Office.
- Since WordPerfect Office 2000, WordPerfect has provided users with the most robust PDF publishing capabilities of any office suite, letting users distribute documents optimized to their desired communications vehicle, while preserving the layout and formatting of their original documents. Requiring no purchase of additional plug-ins or downloads, the Publish to PDF feature ensures that you can share WordPerfect, Quattro Pro, and Presentations files with any computer user around the world.
- Enhanced Multilingual Character changes add support for users who need to create and exchange documents with Microsoft Office formats, and WordPerfect, Quattro Pro, and Presentations formats—especially when exchanging documents with accented characters. The enhancements include supporting multi-language documents, displaying and printing of multi-language documents, copying and pasting of multi-language text inside documents, and saving accented character information in RTF format.
- WordPerfect Office X3 offers an office/home license that provides real value for business owners and employees who own a home computer. When you purchase your copy of WordPerfect Office X3, you are automatically entitled to also use it on your home machine, be it a desktop or laptop.

WordPerfect: New Features and Enhancements

- With half a billion Acrobat Readers installed worldwide, computer users have come to rely on PDF as the preferred format for file exchange. Too often, users are challenged by the inability to adequately access, reuse, or repurpose content in PDF format. To resolve this challenge, Corel introduces PDF Import within WordPerfect X3. By simply opening a PDF file, users can now import the text and graphics directly into WordPerfect and save into any of the various file formats WordPerfect offers—XML, DOC, PDF, and HTML, just to name a few.
- In WordPerfect X3, the Publish to PDF feature has been enhanced to translate WordPerfect table-of-contents headings into PDF bookmarks. This makes it easy to navigate the PDF when it's opened with Adobe Reader—one of the world's most popular free utilities.

- WordPerfect X3 continues to be more compatible than ever, even importing more Microsoft Word file formats than Microsoft does, out-of-the-box. WordPerfect Office X3 suite offers over 150 file formats covering text, graphics, spreadsheets, and database formats—so you are covered no matter what you need to import and create. For WordPerfect X3, the following improvements have been made for Microsoft Word compatibility: supporting automatic paragraph numbering on import and export of Microsoft Word files, enhancements to the alignment of text (as it fits on the page), and new updates to table borders.
- The Web is a critical source of content that can be reused and repurposed in a wide variety of ways. Users need a fast and easy way to capture HTML content without having to play with formatting to ensure the content fits the formatting of a recipient document. WordPerfect Office X3 introduces two shortcuts for copying and pasting HTML (or any other text format). The Paste Unformatted Text command on the context menu (right-click in the page), and the Ctrl+Alt+V keyboard shortcut were added. In addition to these two shortcuts, the export of HTML offers various methods to ensure that HTML is exactly the right export for the job.
- A new integrated search toolbar powered by Yahoo! is now available within WordPerfect X3, so users now have access to tools that tightly integrate the Web into your office suite. Get one-click access to your favorite WordPerfect Office links, including Tips & Tricks, Learning Tools, and other resources along with Yahoo! sites such as News, Finance, Sports, and Mail. Get rid of annoying pop-up windows—use right-click on words within WordPerfect to quickly search the Web.
- In addition to the Yahoo! search toolbar, you can also install the WordPerfect-Yahoo! toolbar and have easy access to all your favorite WordPerfect tools, including Tips & Tricks, Tutorials, Videos on how-to's, special offers, and partner information in Microsoft's Internet Explorer (IE).
- Users can now easily open, view, and print WordPerfect documents, no matter what version, within a browser (as long as WordPerfect X3 is on your system). WordPerfect's integration with Internet Explorer (IE) makes opening WordPerfect files directly into the browser window a snap. This same integration will also extend to such products as Microsoft Sharepoint or IBM Workplace. A key request from users, the integration with IE makes it much easier to work with WordPerfect files from your Web browser.
- WordPerfect has never been afflicted by the metadata issues experienced by Microsoft Word users, and WordPerfect X3 further extends WordPerfect's excellent content security with a new Save Without Metadata feature. To ensure that users can easily remove all sensitive information in one simple step—without downloading additional utilities—the Save Without Metadata feature provides an extra level of protection, protecting customers from possible exposure of sensitive information in a comment, header, or other document component in a one-step save that makes a copy of your original and saves it without confidential information.
- In WordPerfect X3, a number of enhancements have been made to the Word Count feature. You have more control over the count and you can get results quickly and easily.

A new Count button has been added to the status bar. Clicking this button updates the word count. In addition, the Word Count feature can now be customized so you select which document elements (that is, headers/footers, endnotes/footnotes, and comments) are included in the count.

- New label formats from well-known companies such as Avery Dennison (Avery Labels, in letter and A4 sizes), C-Line Label Products, and MACO, a division of ACCO Brands, Inc. (Wilson Jones labels) have been added.
- The Document Routing feature now works with both WordPerfect Mail and Microsoft Outlook. You can use either application to send your WordPerfect X3 document from user to user so they can add comments and return a single document with all edits back to you.

Quattro Pro: New Features and Enhancements

- Now Quattro Pro includes the same robust PDF publishing capabilities offered by WordPerfect. In addition, Quattro Pro users can specify a page range for the PDF, which is useful when exporting only portions of a spreadsheet.
- Improvements have been made in Excel compatibility so you can work with users in the format you want. Enhancements include comments within the Excel spreadsheet and support for cell formatting in Excel 2000 exports.
- With Quattro Pro X3, you have additional connectivity and can create CrossTab reports using Open Database Connectivity (ODBC) sources, such as a Paradox or SQL database.
- Widely used as time variables in spreadsheet applications, Julian dates are a sequential numbering system that represent a continuous count of days and fractions since December 30, 1899. In previous versions of Quattro Pro, users had to alter Julian date and time values for charting. With Quattro Pro X3, users are only required to plot Julian date and time values one time only.

Presentations: New Features and Enhancements

- Presentations X3 contains improvements to import and export of PowerPoint file formats. Based on feedback taken directly from users, the compatibility updates include background, masters, and layouts changes; updates to data charts; importing changes to footers from PowerPoint; object transformation on PowerPoint components (rotating, moving, scaling, and skewing); and matching PowerPoint's transitions of slides and graphics.
- Professional-looking multimedia presentations are now cleaner with rounded fonts and images during editing and playback of slideshows. In previous versions of Presentations, some text and images could appear jagged at certain resolutions. This update, specifically requested by Presentations users, ensures that the edges of fonts and images appear smooth.

- The tightly integrated drawing tools within WordPerfect Office X3 that users have used for years within WordPerfect, Quattro Pro, and Presentations are now available as a separate drawing program called Presentations Graphics X3. Users can create, edit, and enhance original drawings and bitmaps. This easy-to-use creative application offers a broad range of bitmap editing tools and special effects. It also includes a collection of drawing tools for creating lines and shapes. Users can create basic shapes, such as triangles, circles, or rectangles, as well as lines, arrows, stars, captions, and more. In addition, users can save drawings created or enhanced with Presentations Graphics X3 in various file formats, such as WordPerfect graphic, Windows bitmap, JPEG, GIF, and more.

Enhancements to the Professional Edition of WordPerfect Office X3

Paradox is the database application in the WordPerfect Office X3 Professional Edition. Although Paradox is not covered in this book, it is still worthwhile to see what enhancements have been made to the product and to get a better idea of what is in the Professional Edition of the software.

Paradox helps users track, organize, and compile data. This complete desktop database solution stores information in powerful, searchable tables. Paradox now connects to external databases by way of ODBC DSN using Windows XP Service Pack 2. Quattro Pro tables now easily import into Paradox, and DDE-related operations within Paradox work more smoothly.

WordPerfect Office X3 Software Development Kit (now included on Professional CD) is a valuable resource for developers, integrators, IT departments, and users who want to unlock the power of WordPerfect Office's PerfectScript tools. This kit includes documentation on migrating existing projects, macro command history table, WPLOOK.EXE (a tool to internally view and troubleshoot WordPerfect files), and WordPerfect Third Party DLL integration.

WordPerfect Office X3 Deployment Guide Kit (now included on Professional CD) guides administrators through WordPerfect Office X3 customization at the network installation level. Revised and expanded for WordPerfect Office X3, this step-by-step resource simplifies network deployment. It contains detailed instructions on creating a server image, building command lines, and pushing or pulling installations to workstations, as well as frequently asked questions and a glossary of terms.

The Deploying Macros and Templates Kit (now included on Professional CD) provides helpful information on sharing macros and templates with other WordPerfect Office X3 users. Many organizations write custom integration with WordPerfect Office and share those with their users to streamline content creation and automation, and lower training costs. The kit also provides procedures for migrating macros, templates, and customized user settings from previous versions of WordPerfect Office.

The WordPerfect Office X3 Programming Guide for VBA Kit (now included on Professional CD) is an easy-to-use and easy-to-access WordPerfect Office X3 Programming Guide for VBA. Developers who are extending WordPerfect Office X3 for users and for their products by developing and distributing Microsoft Visual Basic for Applications (VBA)

solutions now have a resource manual for detailed instructions on creating, running, debugging, providing a user-interface for, organizing, and deploying macros created with VBA, as well as a glossary of terms.

Introducing the WordPerfect MAIL Application

WordPerfect® MAIL™, the latest addition to the WordPerfect Office family, is a full-featured, easy-to use application that provides e-mail, calendar, and contact management. With lightning speed, WordPerfect MAIL instantly finds information buried by years of accumulated e-mail, contacts, calendar, and folder clutter. It also provides innovative filing capabilities and outstanding spam protection to help users keep their Inbox clean and tidy. In addition, WordPerfect MAIL offers automatic features to manage mailing lists, distribution lists, and RSS (Really Simple Syndication) news feeds. And, users can feel secure knowing that they are avoiding viruses targeted at Microsoft Outlook.

WordPerfect MAIL provides Quick Search buttons that instantly find and sort all messages by a particular sender, or all message within a subject. For example, to find a specific message from within a thread of messages, users simply select any message from the thread and click the Quick Search button to view all related messages.

With WordPerfect MAIL, users can take advantage of Smart Groups to manage subscriptions to RSS (Really Simple Syndication) feeds and online mailing or distribution lists, such as news, reports, and other information that is updated on a regular basis. Smart Groups automatically moves messages from the Inbox to specified folders. RSS feeds, such as CNN, Wired, the Motley Fool, and others, provide an advantage over standard mailing or distribution lists because users do not have to reveal their e-mail address to the provider.

To protect users from junk e-mail (spam), WordPerfect MAIL includes SAproxy Pro, the most comprehensive anti-spam software available today. Using a five-point protection system to fight spam, SAproxy Pro learns from stored e-mails, filters incoming e-mails by using a whitelist and a blacklist system, scans incoming e-mails by using rules, consults with community blacklists, and calculates historical averages of received e-mails. Users can train SAproxy Pro to recognize which messages they consider spam and which ones they consider legitimate.

NOTE

> Because of space constraints, the WordPerfect MAIL application is not covered in this book. However, we have found the help topics to be an excellent resource for learning the program.

How This Book Is Organized

Special Edition Using WordPerfect Office X3 is designed for users who have some experience using a word processor and want to learn how to get the most out of WordPerfect's broad range of features. The book is divided into sections to help you focus on the areas that you

are particularly interested in. The first section is a good place to start because some fundamental concepts are covered, but beyond that, you are free to jump around and read about what interests you.

PART I: LEARNING THE BASICS OF WORDPERFECT

Chapters 1 through 6 cover the fundamentals of using WordPerfect to create, edit, save, and print documents. A short basic formatting chapter covers the features that you need to use right away, such as changing fonts; applying bold, italic, and underline; and adjusting the margins. The file management chapter is in this first section because managing files is such an integral part of what you do every day. After all, what good is all your hard work if you can't find a file when you need it? In the other chapters, you learn how to use the writing tools and how to print, fax, and e-mail your documents. If you're tempted to skip this part because you've already used a word processor, don't. It's loaded with tips and practical advice on how to use the basic features to be more productive.

PART II: FORMATTING DOCUMENTS

Chapters 7, 8, and 9 focus on formatting documents. Chapter 7 sticks to formatting lines and paragraphs, so you learn how to align and indent text, set tabs, keep text together, and add line numbers and borders. Chapter 8 tackles formatting page elements: page numbers, paper size, headers and footers, subdividing the page, columns, borders, and Make It Fit. Chapter 9 explains how to create and implement styles for consistency and speedier formatting. Bet you didn't know that if you modify a style, the text that is formatted with that style is automatically updated, every bit, all at once.

PART III: ORGANIZING INFORMATION

Chapters 10 and 11 cover organizing information into tables, lists, and outlines. You'll learn everything you need to know about creating and formatting tables, and you'll discover why WordPerfect is the champion when it comes to tables. Bulleted and numbered lists are used in all types of documents to present (sequential and nonsequential) pieces of information in an easy-to-read list. Obviously, the Outline feature can be used to create outlines that show the structure of a document or an idea. The outline styles can also be used to create numbered sections of text where the numbers are automatically updated as you rearrange the text.

PART IV: WORKING WITH GRAPHICS

In this section, Chapter 12 teaches you how to incorporate graphics images and effects in your documents. You'll learn how to insert clip art and other types of images, such as those that you take with your digital camera.

In previous editions of this book, we covered graphics quite extensively in other chapters of this section. However, many of the features relating to graphics are really features of the drawing tools found in Presentations. For the next steps in working with graphics, you'll want to look at the online chapter, "Customizing Graphic Shapes and Images," and Chapter 32, "Working with Graphic and Multimedia Elements in Presentations." These chapters

show you how to manipulate graphic images relative to your text and to each other, how to edit clip art, and how to create your own images. You'll also learn about creating specialty text, such as watermarks or 3-D text called TextArt.

Part V: Integrating Information from Other Sources

Chapter 13 shows you how to use information other than graphics from other applications. You'll learn how to use the Windows Clipboard and WordPerfect's Clipbook to copy information between applications. We'll show you how to use OLE to create links from information in your document directly to the program that originated it so you can update information that gets changed easily and automatically. You'll also learn how to import data from spreadsheets and databases. In addition, you'll also want to look at Chapter 33, "Working with Data and Organization Charts in Presentations."

Part VI: Publishing Documents

Chapter 14 covers the document collaboration features, such as document comments, reviewing and comparing documents, adding a digital signature to validate a document, and routing documents. Chapter 15 talks about the features geared toward long documents, such as bookmarks, footnotes, endnotes, cross references, and the Master Document feature. Chapter 16 covers the creation of tables of contents, tables of authorities, indexes, and lists. The Document Map feature is covered here because it uses these reference markers to help you navigate through long documents. Chapter 17 presents information on creating interactive and multimedia documents with hypertext links, links to Web pages, and embedded video and sounds.

You'll also want to look at two online chapters. "Publishing Documents on the World Wide Web" covers WordPerfect's Web publishing features and is packed with practical advice on how to publish your documents on the Internet or your company intranet. "Working with XML Documents" helps you understand XML and how to use it in a shared environment.

Part VII: Automating Everyday Tasks

This last WordPerfect section discusses ways that you can use automation tools to speed up repetitive tasks. Chapter 18 covers templates, from using the project templates that come with WordPerfect to creating your own templates (both from existing documents and from scratch). You'll learn how to insert prompts that guide the user through the template and how to link fields in a template to address book fields. Chapter 19 covers the Merge feature. A complete set of steps for a typical mail merge is given, but the focus is on using other sources for names and addresses and creating documents other than form letters during a merge. Chapter 20 covers using the WordPerfect and Microsoft Outlook address books with some excellent tips on importing and exporting data. Chapter 21 shows you how to use the PerfectExpert panel to create and edit documents without searching through the menus for an elusive command. The bulk of this chapter focuses on macros—running macros that others have developed (including the shipping macros), and creating your own macros with the Macro Recorder. The steps to assign macros to toolbars, keystrokes, and menus are included, as well as information about using macros from previous versions and whether or not you need to install VBA support.

PART VIII: LEARNING THE ESSENTIALS OF QUATTRO PRO

New to this edition is the section covering Corel's spreadsheet program, Quattro Pro. Chapters 22, 23, 24, and 25 get you started with an orientation to Quattro Pro and spreadsheet concepts, working with spreadsheet data, how to format Quattro Pro notebooks, and how to use formulas and functions to get the right results. Chapter 26 focuses on how you work with Quattro Pro data, including sorting, filtering, and consolidating. Chapter 27 introduces tools for analyzing data, such as the Optimizer and the What-If features. Chapter 28 explores using data charts to represent Quattro Pro data. Chapter 29 takes a look at some of Quattro Pro's advanced features, such as macros, expert templates, and Web publishing.

PART IX: CREATING PRESENTATIONS

New also to this edition is this section covering Corel's Presentations program. Presentations is also the engine behind WordPerfect Graphics X3, so much of what you learn here applies also to working with WordPerfect graphics. The focus in this section is on Presentations as a slide presentation tool. Chapters 30 and 31 introduce you to Presentations and show you how to create a basic slideshow. Chapter 32 is an essential chapter if you want to learn more about creating or editing graphic images, or if you want to use multimedia elements in a slideshow. Chapter 33 covers data and organization charts, two features that can be quite useful also in WordPerfect. In Chapters 34 and 35, you learn how to modify Presentations backgrounds, colors, and designs; how to create templates; and how to prepare a slideshow for presenting it. Chapter 36 discusses publishing Presentations slideshows to the Web or to PDF.

LOCATING THE ONLINE CHAPTERS FOR THIS BOOK

You can find the online chapters for this book by going to http://www.quepublishing.com and searching for the ISBN.

CONVENTIONS USED IN THIS BOOK

Que, as well as all of Pearson Technology Group's various imprints, has more than 10 years' experience creating the most popular and effective computer reference books available. From trainers to programmers, Que's authors have invaluable experience using and—most importantly—explaining computer and software concepts. From basic to advanced topics, Que's publishing experience, and its authors' expertise and communication skills, combine to create a highly readable and easily navigable book.

TIP FROM

Liberally sprinkled throughout the text, tips are places where we share insights that we've gained after using, teaching, and writing about WordPerfect for the past 15 years.

NOTE

Notes contain extra information or alternative techniques for performing tasks that we feel will enhance your use and/or understanding of the current topic.

CAUTION

If we want to warn you about a potential problem, you'll see that information in a Caution. Believe me, after years in a classroom, we know all about the pitfalls!

This element is designed to call your attention to areas where you are likely to get into trouble. When you see a Troubleshooting note, you can skip to the Troubleshooting section at the end of the chapter to learn how to solve (or avoid) a problem.

➔ Cross-references are used whenever possible to direct you to other sections of the book that give complementary or supportive information. If you want to learn how to use WordPerfect features together, pay close attention to the cross-references.

BUTTONS

Whenever a button is referred to in an explanatory paragraph or step-by-step procedure, the button will appear in the left margin, next to the paragraph or step that mentions it. This visual reminder helps you quickly locate the button on the toolbar so that you can remember it for future use.

KEYBOARD SHORTCUTS

Whenever a combination of keys can be pressed to execute a command, they'll appear paired by a plus sign, as in Ctrl+Home (to move to the top of a document) or Ctrl+P (to open the Print dialog box). When using a keyboard shortcut, press the first key, and while that key is depressed, tap the second key, and then release the first key.

TYPEFACES

Throughout this book, a variety of typefaces is used, each designed to draw your attention to specific text:

Typeface	Description
`Monospace`	Screen messages, text you type, and Internet addresses appear in this special typeface.
Italic	New terminology and emphasized text will appear in italic.

TROUBLESHOOTING

Every chapter ends with a Troubleshooting section, where you'll find answers to frequently encountered problems. We've addressed more than just the simplest problems and solutions here—we cover the pitfalls you're likely to encounter when you push WordPerfect to the limit.

PART I

LEARNING THE BASICS OF WORDPERFECT

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CHAPTER 1

Getting Comfortable with WordPerfect

In this chapter

by Laura Acklen

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When you sit down to your computer, you're probably going to be creating more than just letters and memos. Downsizing has virtually eliminated support staff and home/small office users don't have that luxury, so it's likely that you are solely responsible for generating your own documents. Well, you can relax because WordPerfect can help you accomplish any task, from typical correspondence to complex mail merges to tables with spreadsheet formulas to desktop publishing to document collaboration to Web publishing.

This chapter covers the basics of creating and saving documents, so if you've used WordPerfect before, you might think you can just skip it. Don't. You'll find lots of useful information and some great shortcuts that you can use every day.

STARTING WORDPERFECT

The quickest way to start WordPerfect is to have a *shortcut* on the desktop. Double-click it, and away you go! If you don't have the shortcut, using the Start menu is easy—it just takes a few more mouse clicks:

1. Click the Start button.
2. Highlight Programs.
3. Highlight WordPerfect Office X3 to open the submenu.
4. Click WordPerfect.

NEW At this point, you may see a dialog box that asks you which mode you want to start in (see Figure 1.1). This is the Workspace Manager, a new feature that helps you switch back and forth between three different WordPerfect interfaces: regular, classic, and legal. You can also switch to a Microsoft Word interface that helps users making the transition from Word to WordPerfect. Leave the selection set to WordPerfect Mode and choose OK to clear the dialog box.

NOTE

> Word users: The Workspace Manager gives you an easy way to switch to Microsoft Word keyboards, menus, and toolbars. There is no change in the way a document is put together. WordPerfect users: The Workspace Manager lets you quickly switch between the regular interface, 5.1 classic mode, and the legal mode (which is basically activating the legal tools).

➔ For more information, **see** "Using the Workspace Manager," **p. 50**.

You're now ready to start working in WordPerfect.

TROUBLESHOOTING *If you can't find the WordPerfect Office X3 folder on your Start menu, see "Having Trouble Starting WordPerfect" in the Troubleshooting section at the end of this chapter.*

Figure 1.1
The Workspace Manager dialog box enables you to select a different interface quickly.

TOURING THE WORDPERFECT SCREEN

All Windows applications look essentially the same. They all have title bars, menus, toolbars, and control buttons. This gives you a distinct advantage because using one Windows application prepares you to learn another.

TIP FROM

In WordPerfect X3, you can click anywhere in a document and move the insertion point to that place. No more pressing Enter or Tab until the insertion point is where you want it. Just click and start typing.

When you start WordPerfect, a blank document appears (see Figure 1.2), so you can start typing immediately. The insertion point shows you where the text will appear when you start typing. The shadow cursor shows you where the insertion point will be if you click the mouse button.

TIP FROM

The Shadow Cursor On/Off button on the application bar shows whether the shadow cursor is turned on (the button appears pressed in). Click the button to turn the shadow cursor on and off.

NOTE

Figure 1.2 shows the WordPerfect window as it appears by default, with the ruler and the Yahoo! Search bar displayed. These two elements were turned off for most of the figures in this book. We did this to maximize the size of the document window, and to avoid screen clutter. These elements are easily reactivated when we need them later. To turn the ruler on/off, choose View, Ruler. To turn the Yahoo! Search bar on/off, click the Yahoo! Search button on the toolbar, or choose View, Yahoo! Search.

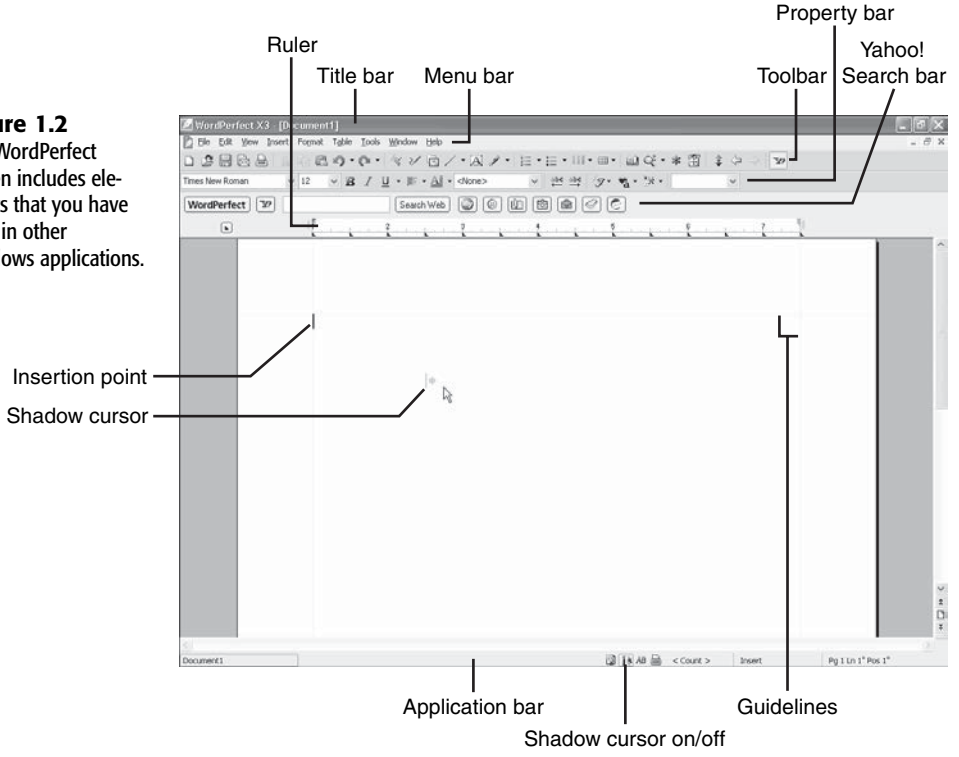

Figure 1.2
The WordPerfect screen includes elements that you have seen in other Windows applications.

The gray lines you see onscreen are called *guidelines*. They help you see the text area of your page by marking the top, bottom, left, and right margins. Clicking and dragging the guidelines is a quick way to change the margins. If you find the guidelines distracting, you can turn them off by opening the View menu and selecting Guidelines. In the Guidelines dialog box, remove the check mark next to Margins, and then click OK.

➔ To learn more about changing the margins with guidelines, **see** "Changing Margins by Using Guidelines," **p. 67**.

SAVING TIME WITH TOOLBARS

The property bar changes depending on where the insertion point is or what you have selected (refer to Figure 1.2). You start out with the text property bar, but as soon as you create a table, it switches to the table property bar. When you move the insertion point into an outline, you get the outline property bar, and so on. It's handy because the buttons you need magically appear, and you get your work done twice as fast because you aren't hunting around in the menus for a command.

TIP FROM

If you point to a button on any of the toolbars and pause, a QuickTip appears that describes the function of that button.

The toolbar is different from the property bar—it doesn't change unless you tell it to. The one you see in Figure 1.2 is called the WordPerfect toolbar and has buttons for general editing tasks. There are more than 20 other toolbars to choose from, including a Microsoft Word 2002 and a Microsoft Compatibility toolbar. Other toolbars contain buttons for working with tables, graphics, outlines, fonts, macros, and so on.

To begin working with toolbars, follow these steps:

1. Right-click the toolbar to open the toolbar QuickMenu (see Figure 1.3). Notice that the WordPerfect toolbar already has a check mark next to it. A check mark next to the name means the toolbar is already displayed. To see a complete list of available toolbars, choose More.

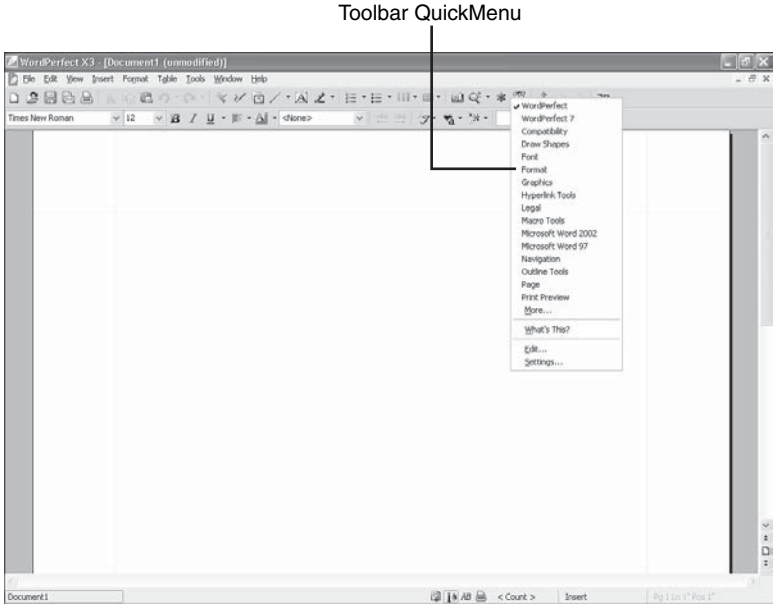

Figure 1.3
You can right-click the toolbar to open a QuickMenu, where you can switch to another toolbar or turn the toolbar(s) off.

2. Click the toolbar you want to turn on (clicking an *unchecked* toolbar name turns it on; clicking a *checked* toolbar name turns it off).

NOTE

You might change your mind and decide not to use a QuickMenu. Just click in the document window to clear it.

If you can't find the toolbar or the property bar, see "The Missing Property Bar and Toolbar" in the Troubleshooting section at the end of this chapter.

If the QuickTips aren't showing up, see "QuickTips Don't Appear" in the Troubleshooting section at the end of this chapter.

CREATING DOCUMENTS

With WordPerfect, you can start typing as soon as the program is loaded. A blank document with all the standard settings in place stands ready for you. Table 1.1 lists some of WordPerfect's default settings. Others are discussed in later chapters.

TABLE 1.1 WORDPERFECT'S DEFAULT SETTINGS

Element	Default Setting
Margins	1 inch at the top, bottom, left, and right
Line spacing	Single-spaced
Font	Times New Roman 12-point
Tabs	Every ½ inch
Paper size	8½ inches × 11 inches
Automatic backup	Every 10 minutes

→ To learn how to change the margins, **see** "Changing Margins by Using Guidelines," **p. 67**.
→ To learn how to change line spacing, **see** "Adjusting the Spacing Between Lines and Paragraphs," **p. 178**.
→ To learn how to change the font, **see** "Choosing the Right Font," **p. 62**.
→ To learn how to change tab settings, **see** "Setting Tabs," **p. 172**.
→ To learn how to change the paper size, **see** "Choosing Different Paper Sizes," **p. 201**.
→ To learn how to change the automatic backup interval, **see** "Saving Documents," **p. 23**.
→ To learn more about setting up your own default settings, **see** "Editing Styles," **p. 236**.

TIP FROM

Templates are documents with formatting and *form text* already in place. All you have to do is fill in the blanks and print (or e-mail, or fax). WordPerfect comes with templates for fax cover sheets, newsletters, certificates, business cards, calendars, labels, and more.

→ To learn more about creating documents with templates, **see** "Using WordPerfect's Templates," **p. 472** and "Creating New Templates," **p. 482**.

NOTE

When you first use a program, there are settings already in place for you. These are called *default* settings. You can set up your own default settings, which define how you want your documents formatted in most cases. This way, you make only minor adjustments, which saves you loads of time in the long run.

TYPING TEXT

One of the coolest features in WordPerfect is the capability to click anywhere in a document, and then start typing. No pressing Enter or Tab or any of that—just click and type!

To type text in a WordPerfect document, do the following:

1. Click anywhere in the document area. The insertion point moves to the new place.
2. Begin typing text.

As you type along, you may occasionally notice that things are happening automatically. For example, if you forget to capitalize the first word in a sentence, WordPerfect corrects it for you. When you type ordinal numbers, WordPerfect changes the two letters to superscript text so the number has the proper format (such as 1st, 2nd, 3rd). This is the Format-As-You-Go feature working for you. Format-As-You-Go corrects common mistakes as you type.

➔ To learn how to customize the Format-As-You-Go feature, **see** "Customizing Format-As-You-Go," **p. 134**.

NOTE

If you are already working on one document and you want to create a new one, click the New Blank Document button on the toolbar.

ERASING TEXT

We all make mistakes when we're typing—especially when we're thinking faster than our fingers can move. The problem is, if you stop and correct every little mistake, you lose your train of thought. A better idea is to correct only those mistakes that you notice right away, and then go back later and fix the rest.

There are three ways to erase text:

- If you make a mistake and you notice it right away, press the Backspace key to backspace over and erase the mistake.
- Click to the left of the word(s) you want to delete and press the Delete key repeatedly until the text has been erased.
- Select the text and then press Delete.

If you've been a little heavy-handed with the Delete key and you've accidentally deleted too much text, see "Heavy-Handed Deletions" in the Troubleshooting section at the end of this chapter.

INSERTING THE CURRENT DATE (AND TIME)

You might be surprised at how many times a day you type out the date. With just one keystroke, you can insert today's date anywhere in a document.

1. Click in the document where you want the date to appear.
2. Press Ctrl+D.

WordPerfect gets the date and time from the Windows Date/Time Properties dialog box, so if the date or time you insert is wrong, you need to reset the clock. Double-click the time on your taskbar to open the Date/Time Properties dialog box, where you can make the necessary changes.

You can also insert the current time into a document. Choose Insert, Date/Time to open the Date/Time dialog box (see Figure 1.4). Select the 12-hour format or the 24-hour format (scroll down the list), and then click Insert.

Figure 1.4
You can choose a format for the date and time in the Date/Time dialog box.

TIP FROM

There is a different type of date for those documents that you use over and over again. This date is automatically updated every time you open or print the document. Consider using it in fax cover sheets, memos, press releases, invoices, receipts, and so on. To insert this type of date, press Ctrl+Shift+D or select Keep the Inserted Date Current in the Date/Time dialog box.

UNDERSTANDING WORDPERFECT'S AUTOMATIC PROOFREADING FEATURES

As you type, you might notice that red squiggly underlines appear under some words. The Spell-As-You-Go feature has marked these words as possible misspellings. Spell-As-You-Go is one of the two automatic proofreading features in WordPerfect—the other is Grammar-As-You-Go, which checks for grammatical errors. If Grammar-As-You-Go is activated instead of Spell-As-You-Go, you might see blue dashes in the text as well. The theory behind these two features is that it's faster to correct errors while you are typing than to go back and fix them later.

Have you incorrectly spelled a word, but don't see the red, wavy line under it? See "Spell-As-You-Go Gone" in the Troubleshooting section at the end of this chapter.

To correct a word with Spell-As-You-Go, follow these steps:

1. Right-click an underlined word to display a list of suggested replacement words that you can choose from (see Figure 1.5).

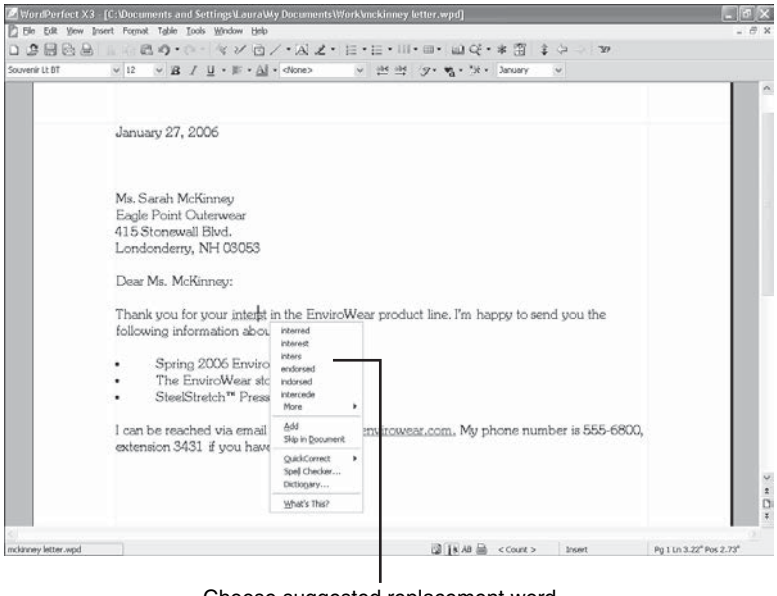

Figure 1.5
You can right-click an underlined word to choose from a list of suggested replacement words.

2. Click the correctly spelled word in the list. That's it—you just corrected the misspelled word. Selecting a word from this list automatically replaces the underlined word with the word you chose.

If you find these proofing marks distracting, you can disable the Spell-As-You-Go and Grammar-As-You-Go features by following these steps:

1. Open the Tools menu and select Proofread. Notice that Spell-As-You-Go has a bullet next to it—this means it's turned on. You can switch to using Grammar-As-You-Go, but both options cannot be selected at the same time. However, because Grammar-As-You-Go includes Spell-As-You-Go, choosing Grammar-As-You-Go turns them both on.
2. Choose Off. Choosing Off turns off both Spell-As-You-Go and Grammar-As-You-Go.

SAVING DOCUMENTS

When you create a new document, your work is being held in your computer's memory, which is a temporary location. It's temporary because if anything happens to your computer and you have to restart, that memory gets erased. This means that you should make a habit of saving your new documents right away. And then, as you work on them, you should save as often as you can. I've developed a habit of pressing Ctrl+S (to save) whenever I stop for a

second. Even if you don't expect to work with this document again, you should save it so you'll have a record of it.

Follow these steps to save a document:

1. Click the Save button.
   - If you've already named this document, it will seem like nothing has happened. Because the document has already been named, WordPerfect saves the changes without any intervention from you. The only difference you'll see is `(unmodified)` after the filename in the title bar—that's how you know a document has been saved.
   - If you haven't named the document yet, the Save File dialog box appears (see Figure 1.6).

NOTE

> The Auto-Suggest Filename feature automatically inserts a suggested filename in the File Name text box when you save a file. You can either accept this name, or type your own.

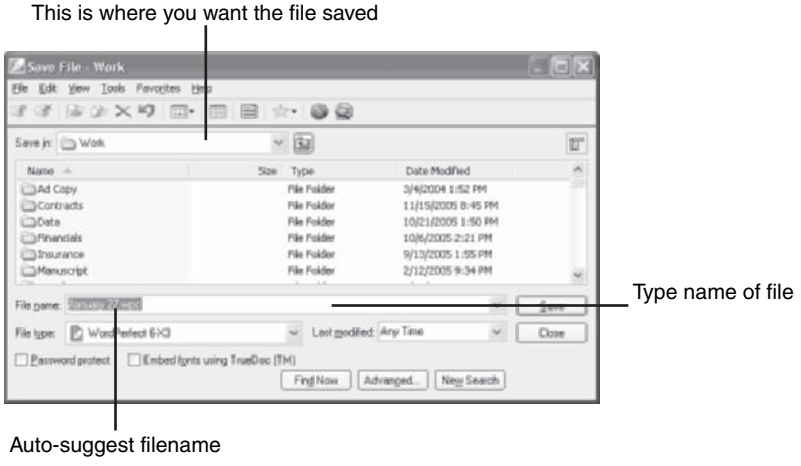

Figure 1.6
You use the Save File dialog box to save your files, giving each a name and a location.

2. Type a filename and press Enter (or click the Save button).
   - Filenames can be up to 255 characters in length and can contain letters, numbers, and spaces. Some symbols can be used, but not others, so to avoid problems, stick with hyphens (-) and underscores (_).
   - You can include the name of the drive and the folder where you want the document to be saved when you type the filename. For example, typing **`c:\reports\income stmt`** saves the document `income stmt` to drive `C:` in the `reports` folder.
   - When you type a filename without selecting a location, the document is saved in the folder that is listed in the Save In text box.

➔ To learn more about how to change to a different folder, **see** "Finding and Opening Documents," **p. 36**.

NOTE

If you want to preserve an original document, choose File, Save As to open the Save As dialog box where you can save the file under a different name. Do this right away so you don't accidentally replace the original with your revised version.

TIP FROM

WordPerfect has a Timed Document Backup feature that automatically makes a backup copy of your document while you work. It's already turned on and set to make a backup every 10 minutes. If you aren't able to exit WordPerfect correctly (because of a power failure or system lockup), you'll be able to open the backup file when you restart WordPerfect. However, if you do exit WordPerfect correctly, the backup file will be deleted.

You can adjust the interval and take a look at where your backup files are created in the File Settings dialog box. Choose Tools, Settings, Files. If necessary, click the Document tab. You can adjust the Timed Document Backup interval by typing a new value in the Timed Document Backup text box or by clicking the spinner arrows next to the text box.

PREVIEWING AND PRINTING DOCUMENTS

Unless you plan to e-mail or fax the document directly from WordPerfect, you'll need to print it. However, before you print a document, you should preview it. Often, the way a document appears onscreen can be quite different from the way it appears when printed.

SWITCHING TO PRINT PREVIEW

The Print Preview feature shows you exactly what your document will look like when you print it. Previous versions of WordPerfect included a Print Preview feature, but you couldn't make any changes while in it. Starting with version 10, you can freely edit the text, reposition graphics, change the margins, and so on.

To use the Print Preview feature, follow these steps:

1. Open the File menu and choose Print Preview. The current page is displayed (see Figure 1.7). Using buttons on the Print Preview toolbar, you can switch to a Two Page view, or you can use the Zoom feature to adjust the size of the page. There are other buttons that give you access to the Make It Fit feature, and both the Page Setup and the Print dialog boxes.

2. When you are finished, click the Print Preview button to switch back to the document window.

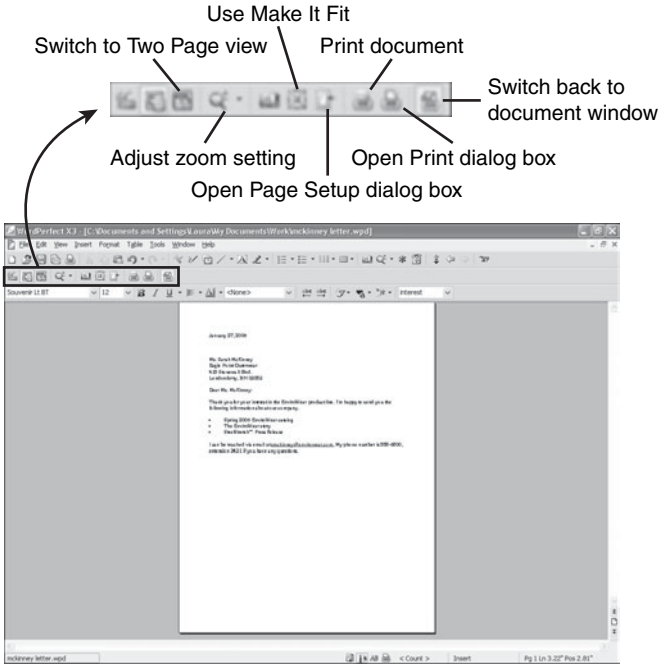

Figure 1.7
Print Preview displays a fully editable representation of how the document will look when printed.

➔ To learn more about how to change the Zoom setting, **see** "Zooming In on Your Text," **p. 48**.
➔ To learn more about the Make It Fit feature, **see** "Using Make It Fit," **p. 217**.
➔ To learn more about the options in the Page Setup dialog box, **see** "Changing Margins," **p. 192**.

PRINTING DOCUMENTS

After you've previewed your document and checked it for accuracy, you're ready to print. If you're printing an envelope, have the envelope ready. (Most printers accept envelopes through a manual feed tray.) Follow these steps to print the document:

1. Click the Print button or press Ctrl+P to open the Print dialog box.
2. Press Enter to send the document to the printer. You perform this type of quick print only if you want to print the whole document and you don't need to select another printer.

TIP FROM

The Print Preview toolbar has a Print Document button that sends the document to the printer, bypassing the Print dialog box.

➔ To learn how to set print options, **see** "Using Print Options," **p. 151**.
➔ To learn how to fax a document, **see** "Faxing Documents," **p. 164**.
➔ To learn how to e-mail a document, **see** "Sending Documents via E-Mail," **p. 165**.

CLOSING DOCUMENTS

When you've finished working on a document, you clear it off your screen by closing the document window. If you haven't saved it yet, you get the chance to do that now. Follow these steps to close a document:

1. Click the Close button on the menu bar.

   If you haven't made any changes since the last time you saved, WordPerfect closes the document. If you *have* made some changes, you'll be prompted to save the document (see Figure 1.8).

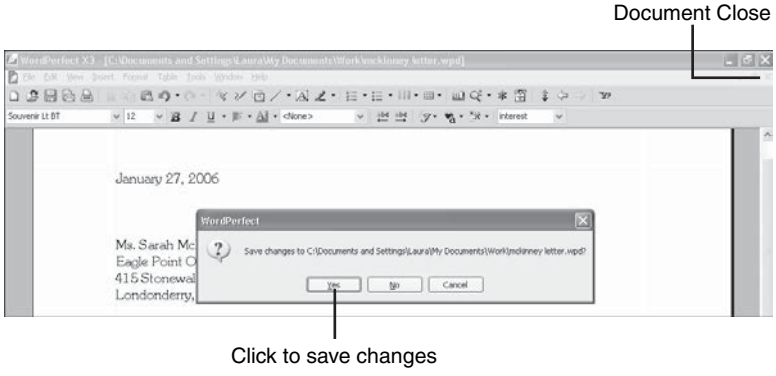

Figure 1.8
When you click the Close button, WordPerfect prompts you to save your changes before clearing the document off the screen.

2. Click Yes if you want to save your work; click No if you want to close the document without saving.

   If you click Yes and you haven't yet given this document a name, the Save File dialog box appears (refer to Figure 1.8). This is where you can type a name and location for the file. Otherwise, WordPerfect saves and closes the document.

3. Type the filename and press Enter.

GETTING HELP

WordPerfect offers an unprecedented level of support to help you become productive as quickly as possible. With so many places to go for help, it's almost like having someone sitting right next to you, telling you which keys to press.

GETTING QUICK AND EASY HELP

Even if you don't know *exactly* what you are looking for, you can still find help when you need it. Here are the places where you can get help while you are working:

- Find out what a button stands for by pointing to it with the mouse and pausing. A QuickTip appears and gives you either the name or a brief description of the button. You can use this on all types of screen elements, not just toolbar buttons.

- Get descriptions of menu items by pointing to the item and pausing. A QuickTip appears with a description.
- Press Shift+F1 to change the mouse pointer into a What's This pointer. Then, click on a screen element for a description.
- In dialog boxes, click the What's This button, and then click the dialog box option you want help on. A QuickTip appears with a description for that option (see Figure 1.9). For more help, click the Help button in the lower-right corner. This opens a Help window with the help topic for that dialog box or feature.

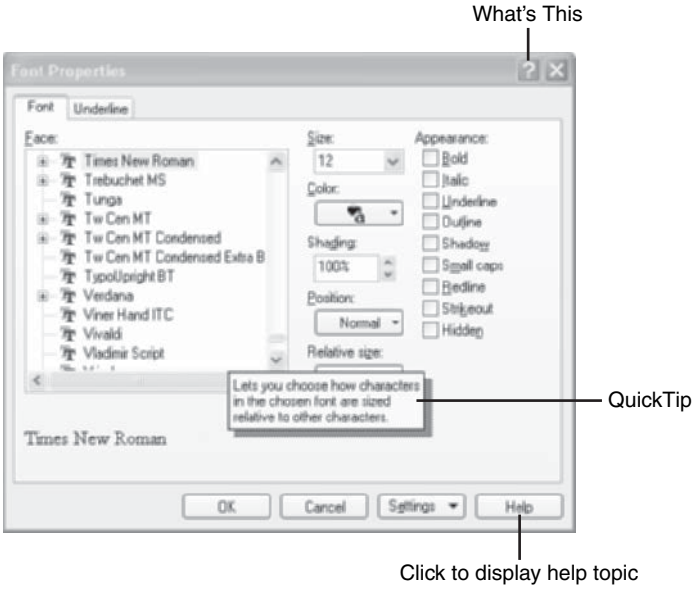

Figure 1.9
If a dialog box has a question mark next to the Close button, you can click the question mark, and then click a dialog box component to display a QuickTip on that component.

CHOOSING FROM THE HELP TOPICS

You can learn a lot about a program when you browse around in the Help screens. There are several ways to access the help topics so you can use whichever method suits your task.

Here are the methods you can use to locate and read the help topics:

- The Contents section is task-oriented, so you're likely to discover features as they relate to a specific project, such as adding images to your documents or using Internet tools. Choose Help, Help Topics, and then click the Contents tab. Double-click the book icons to open more topics. Next to each help page is a question mark icon (see Figure 1.10). To display a help topic, either click these icons or click the name of the help topic.

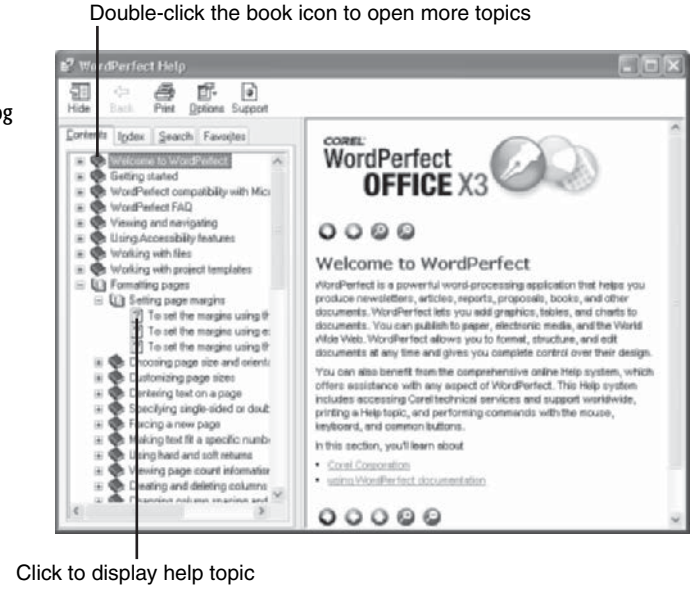

Figure 1.10
The Contents tab of the Help Topics dialog box organizes help topics using a book-and-chapter model.

- The Help Index is great when you want to search for a subject and get a list of help topics from which to choose. Choose Help, Help Topics; then click the Index tab. Type a keyword (or just the first few letters) to jump down through the index (see Figure 1.11). Double-click an index entry to display the help topic, or in some cases, a list of possible help topics from which to choose.

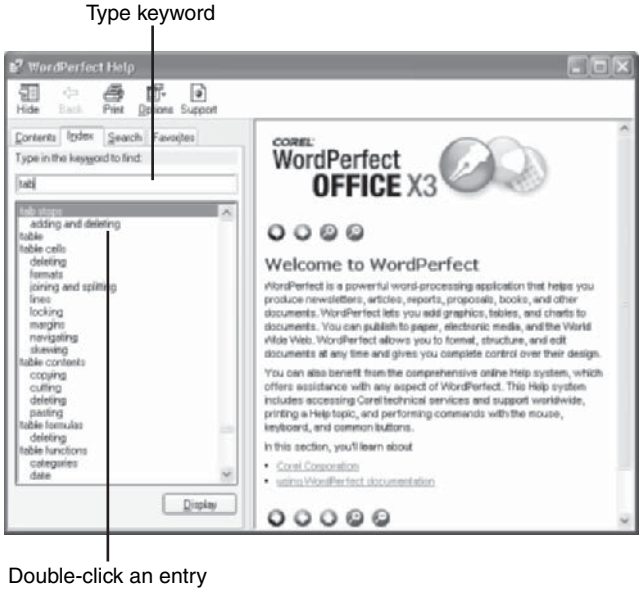

Figure 1.11
The Index tab of the Help Topics dialog box organizes help topics alphabetically in an index.

- If you're still having trouble finding what you want, you can try using the Search feature to search through every word in the help topics. Choose Help, Help Topics, and then click the Search tab. Type in the word(s) you're searching for; then click List Topics. Double-click the help topic that you want to view from the list.

- For the ultimate in point-and-click productivity, choose Help, PerfectExpert. The PerfectExpert panel opens on the left side of the screen, with buttons to help you design virtually every aspect of a document (see Figure 1.12). Rather than searching for the correct command in the menus, you can click buttons from the well-organized lists. (Click the Go Back and Go Forward buttons at the top of the panel to move between lists.)

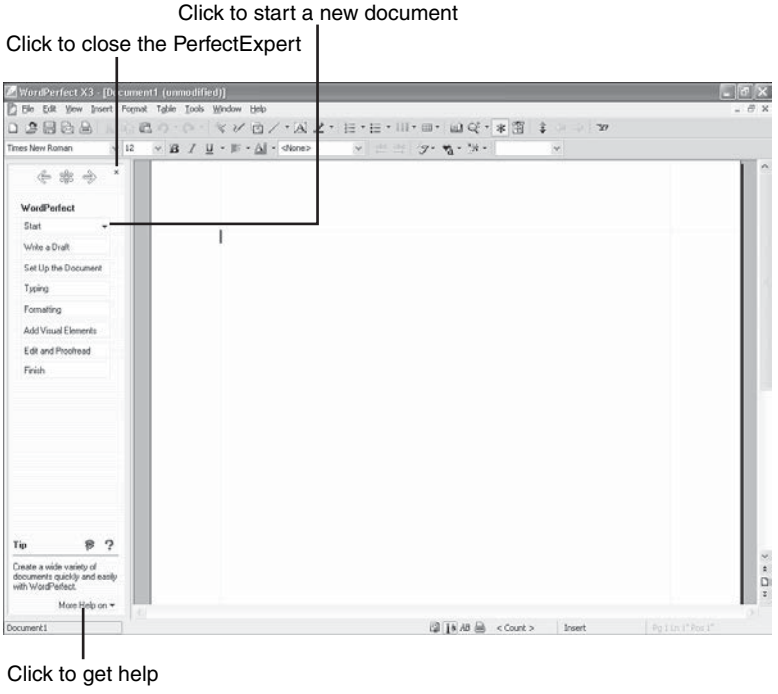

Figure 1.12
The PerfectExpert panel has frequently used features organized so that you don't have to search for items in the menus. All you have to do is click a button and choose from a list.

GETTING HELP ON THE WEB

If you have an Internet connection, there are several Corel Web sites that can provide support. The advantage of using online resources is that they can be continuously updated so you are always getting the most up-to-date information.

- Choose Help, Corel on the Web, and then choose an item from the list. WordPerfect launches your browser and then takes you to the selected page.
- Corel also maintains an online searchable knowledge base. Choose Help, Help Topics; then click the Support button (on the toolbar). Type in a keyword, and then click the Search button to search through thousands of technical information documents (TIDs)

created by Corel's Technical Support department. Figure 1.13 shows a list of documents related to address books in WordPerfect Office. You can also go directly to the knowledge base at `http://support.corel.com`.

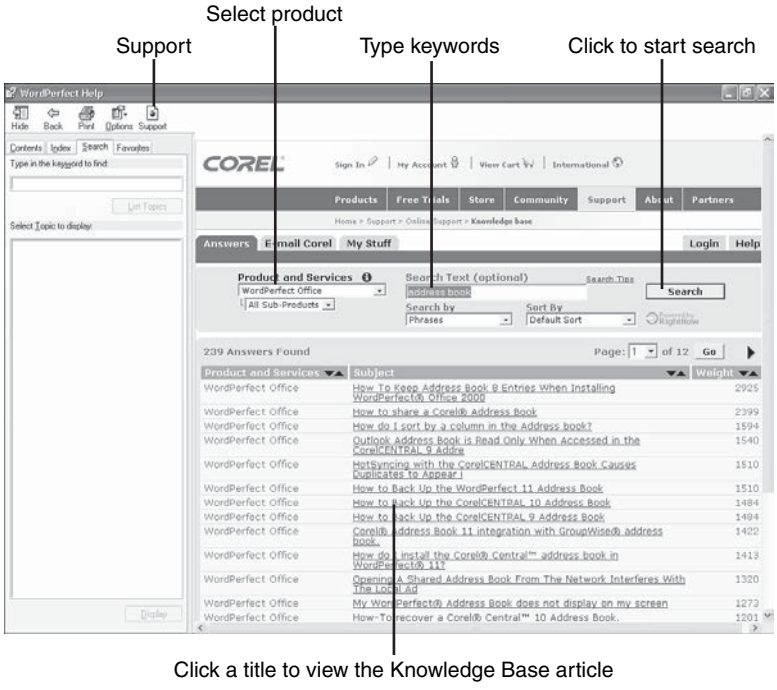

Figure 1.13
You can now search through and read documents on Corel's knowledge base from within the WordPerfect Help dialog box.

HELPING MICROSOFT WORD USERS MAKE THE TRANSITION

For those making the transition from Microsoft Word, there is a special help section just for you. Choose Help, Microsoft Word Help and then double-click the WordPerfect Compatibility with Microsoft Word book icon to display a list of help topics to help ease the transition from Microsoft Word (see Figure 1.14). Using familiar toolbars, menus, and keyboard shortcuts will go a long way toward easing your transition to WordPerfect.

In this section of help topics, you will learn how to

- Open Microsoft Word documents in WordPerfect.
- Save documents in Microsoft Word format so that you can easily share documents with clients and associates who use Word.
- Convert multiple files from Microsoft Word format to WordPerfect format.
- Turn on the Microsoft Word toolbar so that you can find familiar buttons.
- Compare the Word shortcut keys to WordPerfect shortcut keys so that you can see the differences. A link takes you to a help topic that explains how to customize the shortcut keys to reflect Microsoft Word or WordPerfect settings.

Figure 1.14
A special section in Help assists Word users when they make the transition to WordPerfect.

- Use the Microsoft Outlook address book so you can bring your contact information into WordPerfect.
- Compare WordPerfect and Word features so that you can match up similar features.

Word users also will benefit by reading the WordPerfect FAQ (Frequently Asked Questions) section of the WordPerfect Compatibility with Microsoft Word Help. The FAQ section includes tips about opening and saving Word documents in WordPerfect, copying and pasting formatted text from Word files into WordPerfect, and using WordPerfect's reviewing documents feature (the equivalent of Track Changes/Compare Documents in Word).

Most importantly, Word users should review the section on Reveal Codes in Chapter 3, "Learning Essential Formatting Techniques." Reveal Codes, a powerful feature of WordPerfect for which there is no true equivalent in Word, gives you an easy and intuitive way to troubleshoot unexpected problems. Mastering this feature will help you gain control over your documents.

EXITING WORDPERFECT

The quickest way to exit WordPerfect is to click the application Close button. You'll see two Close buttons in the upper-right corner. Don't let this confuse you—the top one is the application Close button; the bottom one is the document Close button.

When you closed your document, you clicked the bottom Close button. Now, click the top Close button to close the application window and exit WordPerfect.

Exit WordPerfect by doing the following:

1. Click the application Close button. Before closing the program, WordPerfect prompts you to save your changes (in every open document window).
2. If necessary, give filenames to any documents that you have not yet saved and named.

TIP FROM

Laura Acklen

Would you like to be able to pick up *right* where you left off when you start WordPerfect again? Let's say you're working on three documents, and you want to be able to save your place in one of the documents. The next time you start WordPerfect, you want those same three documents open and your insertion point where you left it. No problem—choose the Tools menu and select Settings, and then Environment to open the Environment Settings dialog box. Click the Interface tab. In the Save Workspace section, select Always (to save automatically each time you exit) or Prompt on Exit (to selectively save the workspace). Click OK and then Close to return to the document.

TROUBLESHOOTING

HAVING TROUBLE STARTING WORDPERFECT

I'm trying to start WordPerfect, but I can't find WordPerfect Office X3 on my Start menu.

The program hasn't been installed on your system yet. Insert the WordPerfect Office X3 CD in the CD drive. If the Setup program doesn't start in a minute or two, choose Start, Run, browse to the CD drive, and then double-click `setup.exe` to start the installation wizard.

THE MISSING PROPERTY BAR AND TOOLBAR

I don't see the property bar or the toolbar on my screen.

It's possible that another user has placed these bars somewhere else on the screen. Look on the left and right sides of the document window. Also, look at the bottom of the screen, just above the status bar. The property bar and toolbar might also be positioned as a "floating palette" anywhere in the document window. To move them back, point to a blank section (or the title bar of the palette) and wait for a four-pronged arrow to appear. Click and drag the bar back up to the top of the screen. When the gray guidelines appear as a long rectangle, release the mouse button.

If you don't see the bars at all, they've probably been turned off. Choose View, Toolbars. Place a check mark in the box next to Property Bar and/or WordPerfect, as needed.

QUICKTIPS DON'T APPEAR

When I point to a toolbar button, a QuickTip doesn't appear.

Perhaps another user turned off QuickTips. Choose Tools, Settings to open the Settings dialog box. Click the Environment icon, and then click the Interface tab. Place a check mark in the QuickTips check box, click OK, and then click Close.

HEAVY-HANDED DELETIONS

I got in a big hurry and deleted way too much text. How can I get it back?

You mean, you don't remember exactly what you just deleted so you can't just type it back in really fast? Well, no one else does, either. Press Ctrl+Z or click the Undo button to reverse the last action taken on the document. If this doesn't work, you've done something else after you deleted the text. Press Ctrl+Z or click the Undo button until the text comes back.

If you click Undo too many times, you can click Redo to undo the last Undo. It sounds like a tongue twister, but it really does work that way. Seriously.

SPELL-AS-YOU-GO GONE

I don't see any red wavy lines onscreen, even if I type a misspelled word.

The Spell-As-You-Go feature has been turned off. Choose Tools, Proofread, Spell-As-You-Go to turn it back on.

CHAPTER 2

Opening and Editing Documents

In this chapter

by Laura Acklen

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FINDING AND OPENING DOCUMENTS

Although much of what you work on in WordPerfect is new, original material, more often than not you will find yourself modifying and correcting existing documents. That, after all, is the real value and power of the word processing program: It saves you time and energy as you perfect your work.

WordPerfect's Open File dialog box is the easiest way to locate and to open existing files. It's WordPerfect's friendlier equivalent to the Windows Explorer. Simply choose File, Open (or press Ctrl+O or F4) and WordPerfect displays the dialog box shown in Figure 2.1.

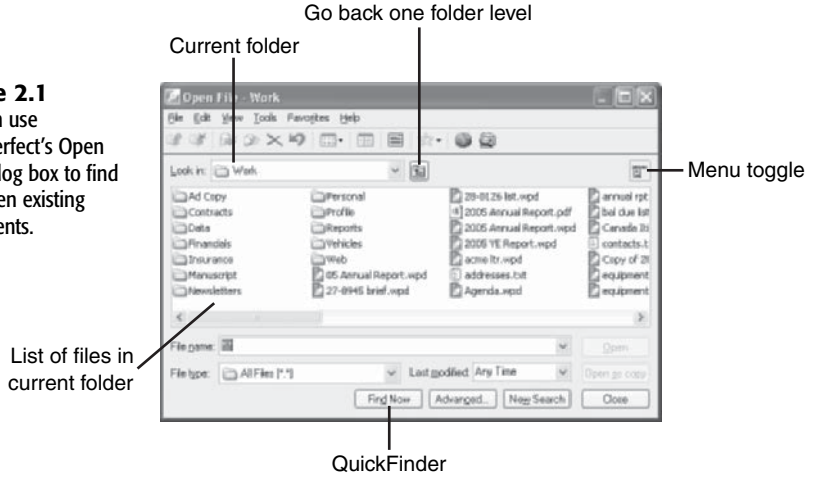


Figure 2.1
You can use WordPerfect's Open File dialog box to find and open existing documents.

TIP FROM

WordPerfect has a handy feature that remembers the last nine documents you worked on and lists these at the bottom of the File menu. Simply click File and then click the name of the document you want to open. That's it! WordPerfect opens the document and you're ready to begin editing.

WordPerfect automatically opens the default, or the most recently opened folder. To open a file in this folder, scroll through the list, click the file you want to open, and click Open. You can also double-click the file to select and open at the same time.

TIP FROM

Unfortunately, in WordPerfect when using Windows XP/2000, the path (location) to the default folder is horribly long. You can change the default location to something simpler, for example c:\docs, by choosing Tools, Settings, Files, and changing the location and name of the default document folder.

UNDERSTANDING THE OPEN FILE DIALOG BOX

You'll probably be surprised at how useful WordPerfect's file management system (the Open File dialog box) can be. You'll find yourself here often as you find, open, delete, rename, or copy files. After a quick overview, you'll be able to use this tool much more effectively.

The Views button determines how WordPerfect displays filenames in the file list. You can click the Views button to choose from the following View button options:

- Thumbnail shows each file with a large icon. In the case of photos, you'll see a tiny picture.
- Tiles shows the list of files with medium icons, arranged alphabetically by row from left to right.
- Icons shows the list of files with small icons, arranged alphabetically across each row.
- List is the default view, and files are shown with tiny icons, arranged alphabetically by column from top to bottom.
- Details is perhaps the most useful view (see Figure 2.2). Files are listed with tiny icons, arranged alphabetically from top to bottom with the file size and the date and time the file was last modified shown.

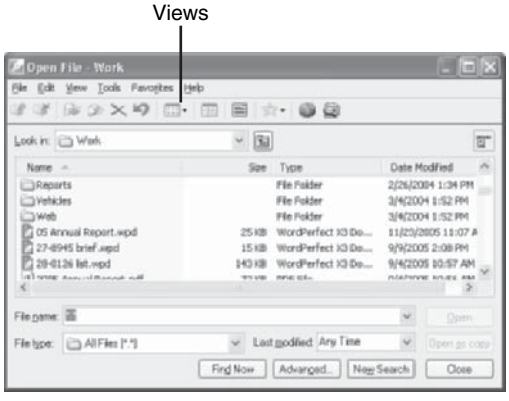
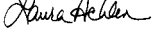


Figure 2.2
The Details view of the Open File dialog box offers the most information about files, and also enables you to sort your files.

TIP FROM



The column heading buttons in the Details view can do much more than look pretty. Click the Date Modified button, for example, and WordPerfect arranges the list of files in chronological order of when the files were last modified. Click it again to sort in reverse chronological order. Click the Name button and you get an alphabetical listing. This procedure also works in other Windows applications where the files are listed with column headings.

TIP FROM

Don't forget that you can size the Open File dialog box window just as you do most Windows windows. A larger Open File dialog box is particularly useful if you choose the Details view.

If you really want to make the WordPerfect Open File dialog box look like Windows Explorer, click the Folders button (see Figure 2.3).

Figure 2.3
If you toggle the Folders view on, the Open File dialog box looks and works very much like Windows Explorer.

PREVIEWING FILES

If you want to preview a file created by WordPerfect Office before opening it, click the Preview button (see Figure 2.4).

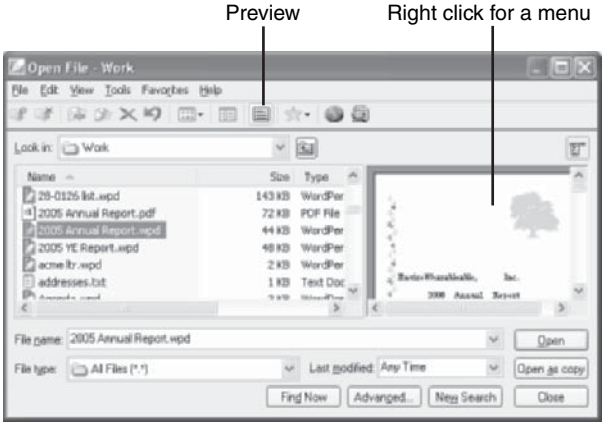


Figure 2.4
The Preview view shows you a thumbnail sketch of a page of your document.

Unfortunately, what you actually see in the Preview window is so small that it's not terribly useful as you try to determine the contents of the file. However, you can remedy this by creating a larger Preview window. Follow these steps:

1. Right-click the Preview window to display a menu of choices.
2. Choose Use Separate Window. WordPerfect displays the document in a separate Previewer window. You can also choose View, Preview, Use Separate Window.
3. Using the mouse to click and drag the window borders, resize the Previewer window so that it's large enough to display the document in a readable format.
4. When you are finished, click the Close button in the Previewer window to return to the Open File dialog box.

The next time you use the Preview function, WordPerfect will display the document in a separate window. To cancel the separate preview window, simply right-click the Previewer window and uncheck Use Separate Window.

The main limitation in using the Previewer is that it can only display documents or graphics created by recent versions of the WordPerfect Office suite, including WordPerfect, Quattro Pro, or Presentations. Although it is purported to be able to preview Word documents, for these and for other non-WordPerfect files you're likely to use, including .gif or .jpg Internet files, the Previewer does not work.

CHANGING TO ANOTHER FOLDER

What happens when you don't see the file you want in the current folder? Assuming that you did save the file, the most likely reason you don't see it is that you saved it in a different folder.

To navigate to another folder, first look in the list of files for other folders that might contain the file. Double-click a folder to open it and to see its contents.

If you don't find the file there, you might have to return to the next level up. Just click (once) the Go Back One Folder Level button (refer to Figure 2.1) and then decide whether to try another folder, or to go back another folder level.

If you do change folders, the last opened folder becomes the default folder. The next time you access the Open File dialog box, you see a listing of files in that folder. This can be confusing if you're not mindful of which folder you are in.

If you want to always open the same default folder, choose Edit, Change Default Folder (make sure it does *not* have a check beside it). Now, regardless of how often you browse for files in other folders, you'll always return to the default folder when you access the Open File dialog box.

Still having trouble making the proper default folder come up when you access the Open File dialog box? See "Setting the Default Folder" in the Troubleshooting section at the end of this chapter.

USING QUICKFINDER TO LOCATE DOCUMENTS

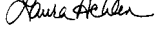
Sometimes you simply can't remember the name of the document you're looking for. However, you might remember a keyword or phrase that you know is contained in the document itself. WordPerfect's *QuickFinder* feature enables you to search for and find documents based on their contents.

Access the Open File dialog box, and in the File Name text box, type the word you want to find. Then, click Find Now. Do *not* click Open and do *not* press Enter. WordPerfect searches all the documents in the current folder and its subfolders, and returns the results in the QuickFinder Results dialog box. Select the file you want, and click Open.

NOTE

Not all versions of WordPerfect Office X3 will have QuickFinder. For example, most OEM versions and the Home edition will not include it. If it is important to you, consider upgrading to the Student & Teacher edition (if you qualify), the Small Business edition, or the Standard edition.

TIP FROM



If you know the name of the file you're looking for, but just can't seem to find it, don't forget that you can use the Windows Search feature. Click the Start button, choose Search, All Files and Folders, and then search for your file by name.

➔ To learn more on how to search for files using the QuickFinder utility, **see** "Finding Missing Files by Using QuickFinder," **p. 96**.

OPENING A COPY OF A DOCUMENT

Sometimes you want to edit a copy of a document, but you want to leave the original intact. For example, you need the original for historical purposes or as a reference point. Follow these steps:

1. Choose File, Open.
2. Find and select the file you want to work on.
3. Click the Open As Copy button (not the Open button). WordPerfect opens a copy of the file, which you now can edit.
4. When you finish making changes, choose File, Save. WordPerfect forces you to provide a new filename.
5. Click Save and you now have a modified copy of the original, leaving the original intact.

CONVERTING DOCUMENTS ON OPEN

Believe it or not, not everyone uses Corel WordPerfect! Even if they do, they don't always use the most recent version. Fortunately, WordPerfect's built-in file conversion feature enables you to open nearly every kind of word processing document.

TIP FROM

If you have a lot of old WordPerfect files, you don't need to worry about losing them when you switch to WordPerfect X3. The WordPerfect file format hasn't changed since version 6. Just leave them alone until you need them, and *then* open them into WordPerfect X3 just as you open any normal document.

When you save a converted document, WordPerfect asks whether you want to save it in the latest WordPerfect format (WordPerfect 6-X3) or in the original format from which it was converted (see Figure 2.5). If you're returning the document to someone who isn't using WordPerfect, simply select the original format and click OK.

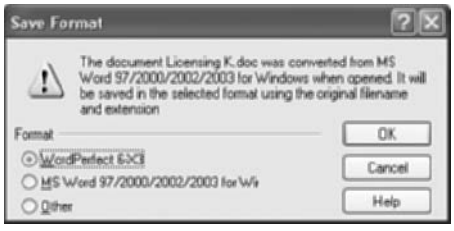


Figure 2.5
Before saving an edited non-WordPerfect file, WordPerfect asks if you want to convert it back to the original file, or keep it in the updated WordPerfect format.

➔ To learn how to convert several documents at once using the WordPerfect Conversion Utility, **see** the tip on **p. 351**.

➔ To learn more about working with Word documents and documents in other formats, **see** "Working with Word and Other Word Processing Documents," **p. 348**.

GETTING AROUND IN A DOCUMENT

When you have found a document to edit, you need to know the most efficient ways of getting around so you can quickly make changes to the document. Before you can make a change, you must reposition the insertion point (that is, the cursor) at the point at which you want to make the change. You can move the insertion point by using either the mouse or the keyboard.

USING THE MOUSE TO MOVE AROUND

You move the insertion point with the mouse in the following ways:

- **Point and click**—Position the mouse pointer at the location in the text where you want to place the insertion point.
- **Scrollbar**—As in any Windows application, you can scroll bit by bit simply by clicking the up and down arrows at either end of the vertical scrollbar. You can scroll more quickly by clicking and dragging the scroll box found between the two arrows. When you use the scroll box, WordPerfect displays a QuickTip that indicates the page number you see on the screen.

- **Browse buttons**—These buttons are located at the bottom of the vertical scrollbar (see Figure 2.6). By default, you browse by page. Click the double up arrow to go to the previous page, and click the double down arrow to go to the next page. To toggle among other methods of browsing, click the Browse By button, located between the double up and down arrows. You can browse by page, heading, table, footnote, endnote, comment, text box, bookmark, graphic, equation, hyperlink, redline text, or strikeout text.

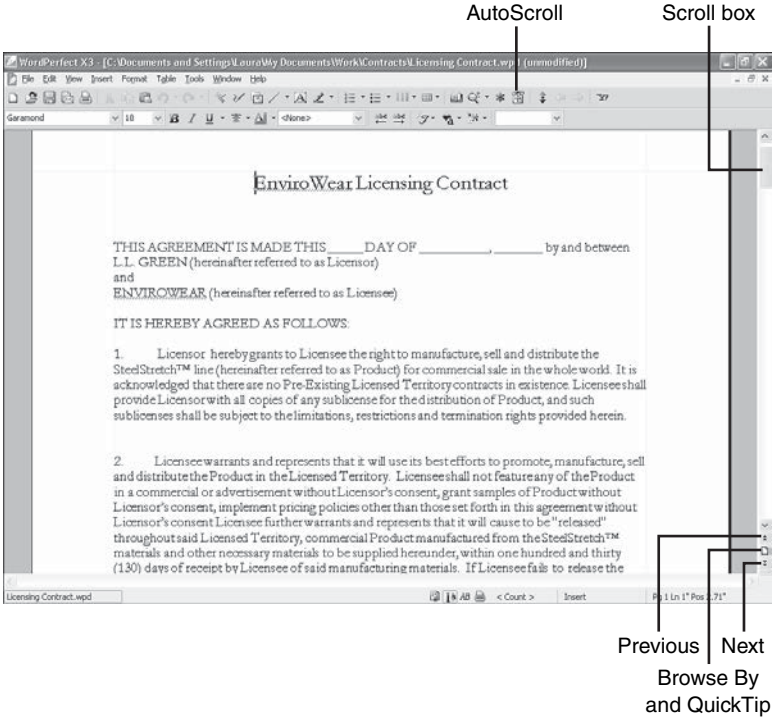


Figure 2.6
You can browse through a document by page, heading, table, and so on using the Browse buttons on the vertical scrollbar.

- **AutoScroll feature**—You can click the AutoScroll icon on the toolbar to activate automatic scrolling. The mouse pointer automatically positions itself in the middle of the screen, and displays a dot with up and down arrows. As you move the mouse pointer up, the pointer changes to a dot with an upward arrow, and the text scrolls toward the top of the document. Pull the mouse downward to scroll toward the bottom of the document. The closer the mouse pointer is to the center of the screen, the slower the text scrolls. Click the mouse to reposition the insertion point, and at the same time turn off AutoScroll.

TIP FROM

Using the AutoScroll feature, you can read your document as you scroll. Simply move the mouse pointer a short distance downward away from the center of the screen to scroll slowly, thus enabling you to read the text before it disappears from the screen.

USING THE KEYBOARD TO MOVE AROUND

Moving the insertion point with the mouse often can be imprecise, and even tedious. Moving it by using the keyboard can be quicker and more accurate. Don't worry if the list of possible keystrokes seems overwhelming. Actually, there are relatively few *different* procedures, each with two or more directions (up or down, for example).

Table 2.1 shows keyboard shortcuts for repositioning the insertion point. These keystrokes are standard in all Windows applications, except as noted (with an asterisk).

TABLE 2.1 WORDPERFECT'S KEYBOARD SHORTCUTS

Keystroke(s)	Insertion Point Moves
Right arrow	One character to the right
Left arrow	One character to the left
Down arrow	One line down
Up arrow	One line up
Ctrl+Right arrow	One word to the right
Ctrl+Left arrow	One word to the left
Ctrl+Down arrow	One paragraph down
Ctrl+Up arrow	One paragraph up
Home	To beginning of current line
End	To end of current line
Page Down	To bottom of current screen
Page Up	To top of current screen
Alt+Page Down*	To top of next physical page
Alt+Page Up*	To top of previous physical page
Ctrl+End	To end of document
Ctrl+Home	To beginning of document

**This keystroke is not standard in other Windows programs.*

WORKING WITH SELECTED TEXT

Can you imagine having to format your text or delete whole paragraphs one character at a time? Fortunately, you can select a chunk of text and cut it, delete it, or apply formatting to it.

Let's look first at selecting text using the keyboard. This procedure is simple after you've mastered the cursor control keystrokes in Table 2.1. To select a portion of text, position the insertion point at the beginning of the area you want to select, hold down the Shift key, and use any cursor movement to move to the end of the selection.

For example, to select text one word at a time, hold down the Shift key while pressing Ctrl+Right arrow. To select everything from the cursor to the end of the document, hold down the Shift key and press Ctrl+End.

NOTE

Selecting text using the Shift key along with cursor movement keys or along with repositioning the insertion point with the mouse is standard in all Windows applications.

TIP FROM

Pressing Shift+End selects the entire line *plus* the hard return, which is a change from previous versions of WordPerfect. If you want to return to the previous WordPerfect default of not including the hard return in the selection, choose Tools, Settings, Environment, and select Use WordPerfect 9 text selection.

Selecting text with the mouse is also easy, although a bit of dexterity and practice might be necessary before you become really good at it.

Table 2.2 shows several methods of using the mouse to select text. Again, these methods are standard in all Windows applications, except as noted (with an asterisk).

TABLE 2.2 SELECTING TEXT IN WORDPERFECT BY USING THE MOUSE

Mouse Action	What It Selects
Drag across text	One whole word at a time
Alt+drag across text	One character at a time
Double-click	Entire word
Triple-click*	Entire sentence
Quadruple-click*	Entire paragraph
Single-click in left margin*	Entire sentence
Double-click in left margin	Entire paragraph

**This mouse action is not standard in other Windows programs.*

The methods listed in Table 2.2 are used only for selecting text. The mouse is used differently to select graphics objects or cells of a table.

➔ To learn more about selecting graphics objects, **see** "Resizing and Moving Graphics," **p. 310**.

➔ To learn more about selecting tables and table cells, **see** "Selecting Text and Cells," **p. 256**.

DELETING TEXT

You already know how to delete text by using the Backspace key (erasing to the left of the insertion point) or the Delete key (erasing to the right of the insertion point). However, you can also quickly delete a selected block of text. After selecting the text you want to delete, you can use one of these methods:

- Press Delete.
- Press Backspace.
- Right-click the selection and choose Delete from the QuickMenu.

MOVING AND COPYING TEXT

So, you've got some text selected. Besides deleting it, what else can you do with it? The "bread and butter" of word processing consists of moving text from one place to another. When you move the text, but leave a copy in the original location, you are *copying and pasting* text. If you move it and delete the original location, you are *cutting and pasting* text.

WordPerfect likes to try to please everyone, so there are several different ways to cut and paste selected text. The basic procedure is this:

1. Select the text you want to move.
2. Copy (or cut) the selected text.
3. Reposition the insertion point at the target location.
4. Paste the text you copied (or cut).

You can paste copied text as many times as you like, until you copy or cut something new.

NOTE

> The Windows Clipboard is an area of your computer's memory that stores information that you cut or copy. If you cut or copy another selection, this selection replaces whatever was in your Clipboard. If you turn off your computer, you lose the complete contents of the Clipboard.

The various methods for copying, cutting, and pasting are listed in Table 2.3. Use the method that helps you work the fastest. For example, if your hands are already on the keyboard, try using the keyboard methods. Otherwise, you might want to use the mouse.

TABLE 2.3 METHODS FOR MOVING TEXT

Action	Method
Copy	Choose Edit, Copy Click the Copy toolbar icon Right-click the selection and choose Copy Press Ctrl+C Press Ctrl+Insert
Cut	Choose Edit, Cut Click the Cut toolbar icon Right-click the selection and choose Cut Press Ctrl+X Press Shift+Delete
Paste	Choose Edit, Paste Click the Paste toolbar icon Right-click and choose Paste Press Ctrl+V Press Shift+Insert

TIP FROM

Typically when you cut or copy material, it replaces anything you previously cut or copied to the Windows Clipboard. Corel's Clipbook program allows you to save multiple clips to a clipboard and then paste them in whatever order you choose.

➔ To learn more about cutting and copying text, **see** "Moving Information in Windows" in Chapter 13, "Importing Data and Working with Other Programs."

➔ To learn more about the Clipbook, **see** "Using the Clipbook Program" in Chapter 13, "Importing Data and Working with Other Programs."

TIP FROM

A fast and easy-to-remember sequence for cutting and pasting involves using the Shift key: Shift+cursor to select the text, Shift+Delete to cut the text, and then Shift+Insert to paste the text. If you learn these keystrokes, you can save incredible amounts of time as you cut and paste.

Is what you pasted different from what you thought you copied? See "Pasting Things Correctly" in the Troubleshooting section at the end of this chapter.

WordPerfect also enables you to use the mouse to drag selected text from one location and drop it in another. This Drag and Drop feature can be useful in many situations. To drag and drop text, follow these steps:

1. Use the mouse or the keyboard to select the text you want to move.
2. Position the mouse pointer on the highlighted text. The pointer changes to an arrow.
3. Click and hold down the left mouse button.
4. Drag the mouse to the target location. The mouse pointer changes to an arrow along with a small rectangular box (see Figure 2.7). The insertion point (or shadow cursor) shows exactly where the text will be pasted when you release the mouse button.

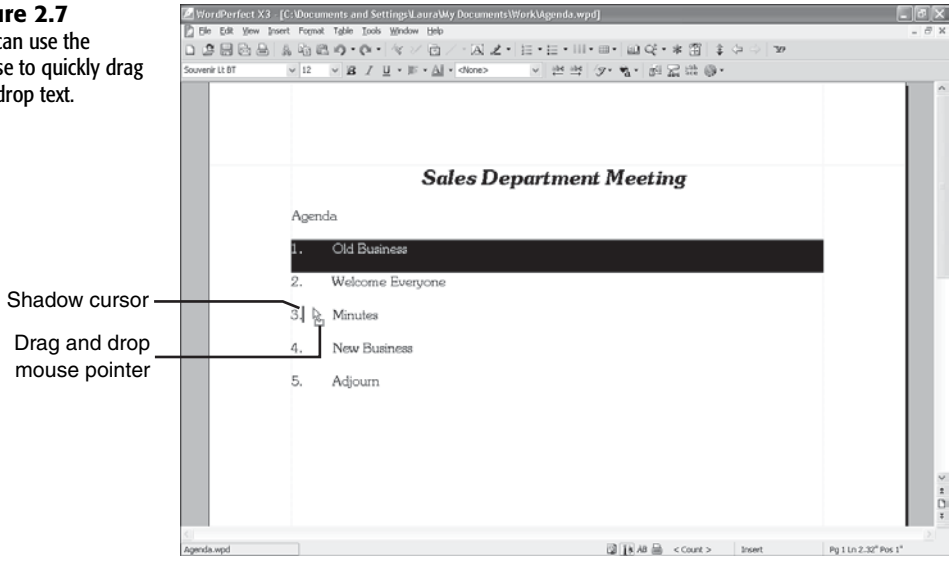


Figure 2.7
You can use the mouse to quickly drag and drop text.

5. Release the mouse button. WordPerfect continues to highlight the text. If you didn't quite hit your target, you can drag again, or you can choose Undo and start over again.
6. When you have the selection where you want it, click the selection to deselect it.

TIP FROM

In addition to moving text, you can also copy selected text by holding down the Ctrl key while dragging and dropping the text.

USING UNDO TO CORRECT MISTAKES

When your finger slips and you type the wrong letter, it's no big deal. Backspace quickly zaps the letter and you're back on track. But when you make a change to a large amount of text, reconstructing the original can be tedious and time-consuming. Fortunately, WordPerfect gives you a way to undo your actions quickly and easily. WordPerfect remembers up to the last 10 things you did, and enables you to undo them sequentially in reverse order.

You can use any of the following methods to undo an action:

- Choose Edit, Undo.
- Click the Undo icon on the toolbar.
- Press Ctrl+Z.

If you get carried away and undo too many steps, you can also redo those steps by clicking the Redo icon on the toolbar or choosing Edit, Redo.

CAUTION

Both Undo and Redo operate sequentially. If you need to undo or redo a step or two, do so immediately. Otherwise, you might not be able to back up or move forward without undoing correct steps or redoing incorrect steps.

TIP FROM

You can click the drop-down menu on the Undo and Redo buttons on the toolbar to display a list of your 10 most recent steps. To Undo or Redo more than one step at a time, just move the mouse pointer to select the number of steps you want to Undo or Redo and click.

By default, WordPerfect does not save Undo information with your document. Thus, if you save your document while still working on it, as you should, or if you close your document, you can no longer undo your most recent actions. You can avoid this by having WordPerfect save Undo information along with the document. Choose Edit, Undo/Redo History, Options and check Save Undo/Redo Items with Document. If you or someone else opens the document later, you can still undo the last 10 steps performed on the document. Note, however, that if you are deleting or moving large quantities of text or graphics, or if you also choose to increase the number of Undo/Redo items, and you save the Undo information, the size of your saved file can increase dramatically.

NOTE

By default, WordPerfect remembers only your last 10 actions. You can increase this amount, up to 300, by choosing Edit, Undo/Redo History, Options and changing the Number of Undo/Redo Items.

ZOOMING IN ON YOUR TEXT

No matter where you choose to edit your document—in the document window or in Print Preview—you can adjust the size of the document onscreen making it easier to see what you're working on.

USING THE ZOOM SETTINGS

By default, WordPerfect displays your document at a zoom ratio of Page width. This means that the document is displayed in the document window with a small gray border around it. Although a smaller zoom ratio enables you to see more of the page, you might find it difficult to read the text or see other fine details.

Adjust the zoom by following these steps:

1. Click the drop-down arrow on the Zoom button on either the Standard toolbar or the Print Preview toolbar. A menu of zoom settings appears (see Figure 2.8).

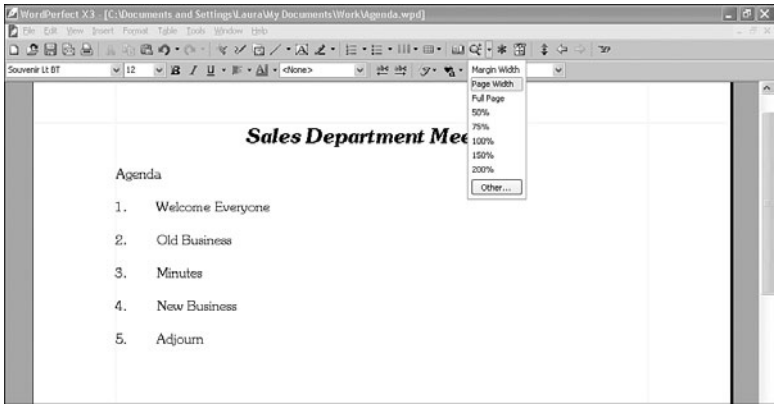


Figure 2.8
Clicking the drop-down menu of the Zoom button enables you to select a zoom ratio. Hover over any setting for a RealTime Preview.

2. Select a zoom setting.

If you have a Microsoft IntelliMouse or equivalent (a mouse with a scroll wheel between the buttons), you can adjust the zoom ratio by holding down the Ctrl key and rotating the IntelliMouse wheel. WordPerfect zooms in or out at intervals of 10% for each notch on the IntelliMouse wheel.

NOTE

> You might find that none of the preset sizes look good on your screen. Don't worry—you're not bound by the standard sizes offered. Simply choose Other from the Zoom button menu, or choose View, Zoom. This opens the Zoom dialog box where you can type in a zoom ratio of your own choosing.

TIP FROM

Sometimes it takes a little experimenting to find the right zoom setting for the task. Fortunately, RealTime Preview shows you a preview of each setting before you choose it. Simply point to and hover over any of the zoom settings, whereupon WordPerfect redisplays the document with that setting. When you find the one you want, click to choose it.

ZOOMING TO SELECTED TEXT

Suppose you really want to get up close and personal with a specific section of your document. With WordPerfect you can magnify selected text by following these steps:

1. Click the Zoom button on the toolbar. WordPerfect displays the mouse pointer as a magnifying glass.
2. Click and drag the area of the document you want to magnify. WordPerfect adjusts the zoom ratio to display the selected text as large as possible.
3. Click the Zoom button again to turn off the magnification feature.

Note that the maximum zoom ratio is 400%. Click the Zoom button drop-down menu to choose a normal zoom ratio once again.

USING THE WORKSPACE MANAGER

Since the introduction of WordPerfect for Windows with version 5.1, users have clamored to get back the blue screen with white text so familiar in WordPerfect for DOS. Other users, new to WordPerfect, want instead to see menus and buttons that are familiar to them.

First introduced in WordPerfect 12, the Workspace Manager enables you to customize quickly and easily WordPerfect's look, including menus, buttons, and screen colors.

To activate the Workspace manager, choose Tools, Workspace Manager. WordPerfect displays the Workspace Manager dialog box (see Figure 2.9).

This is the same dialog box that appears by default when you first start WordPerfect X3. If don't want to be bothered by the Workspace Manager upon startup, just uncheck the Show at Startup check box.

CAUTION

Changing the workspace does *not* change how WordPerfect features work. Further, if you inadvertently change the workspace, you might find it difficult to locate and use features you're already familiar with.

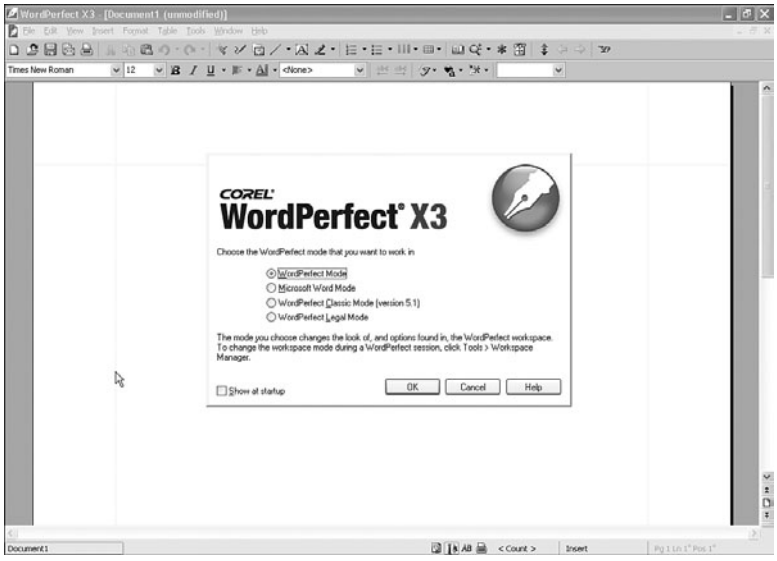


Figure 2.9
The Workspace Manager helps create a customized working environment by changing menus, toolbars, or colors.

WORKING IN THE MICROSOFT WORD MODE

The primary reason for switching to the Microsoft Word mode is to make it easier to find features that are similar in both programs, but that are located differently on menus or toolbars in each program.

If you choose Microsoft Word mode from the Workspace Manager, WordPerfect displays differently organized menus and toolbars, a PerfectExpert box to assist you, and a floating Compatibility toolbar (see Figure 2.10).

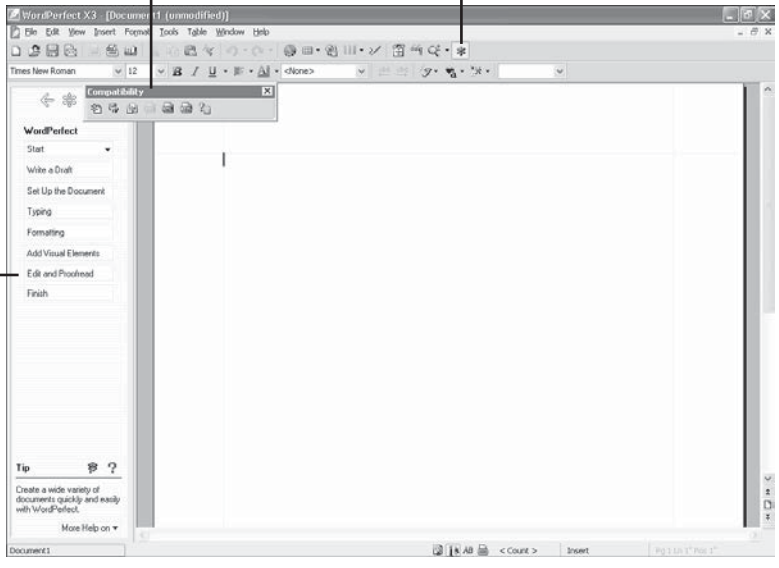


Figure 2.10
The Microsoft Word mode assists those familiar with Word as they create and edit WordPerfect documents.

The three most significant features in this mode are

- **Menus**—Although WordPerfect's features function the same as always, the location of the menu items required to select certain features have been moved to reflect their location on Word menus. For example, in WordPerfect, the Outline/Bullets & Numbering feature is located under the Insert menu. In Word, it's called Bullets and Numbering, and it's located under the Format menu. In Word mode, WordPerfect uses its own feature name, Outline/Bullets & Numbers, but you'll find it under the Format menu.
- **PerfectExpert**—Targeted to those not very familiar with WordPerfect, the PerfectExpert dialog box guides you through the basic elements of creating, editing, formatting, and finishing a WordPerfect document.
- **Compatibility toolbar**—The buttons on this floating toolbar help you quickly convert documents to or from Word, to PDF, XML, or HTML, and to access specific help about WordPerfect for Word users.

The Microsoft Word mode is intended for the most part as a transition tool until one becomes more familiar with WordPerfect's features. For example, quite likely you'll soon close the PerfectExpert dialog box. However, you might still want to use Word-type menus or toolbars until you become more familiar with how WordPerfect does things.

SWITCHING TO 5.1 CLASSIC MODE

Starting with WordPerfect 11, you have the option of working in WordPerfect "Classic" mode, which emulates to a certain degree the workspace of a WordPerfect 5.1 document. You switch to this mode by choosing Tools, Workspace Manager, and selecting WordPerfect Classic Mode (version 5.1), shown in Figure 2.11.

Figure 2.11
The Classic Mode emulates DOS-based WordPerfect 5.1's keyboard and uncluttered blue screen.

The primary characteristics of this mode include the following:

- A blue background, with white text and guidelines.
- The absence of toolbars, rulers, or horizontal scroll bars, which also provides more workspace.
- The use of version 5.1's keystrokes, including F3 for the Help key, F7 to exit, Shift+F7 to print, and so on. Many feel that a more keyboard-based approach to word processing is faster and more efficient.
- A few features long since absent in Windows versions of WordPerfect, such as Undelete (F1), become available.

If you like the clean screen and blue background, you can customize the classic workspace. For example, you can

- Add toolbars by choosing View, Toolbars, and selecting those you want to see.
- Add the Ruler by choosing View, Ruler.
- Change back to the WordPerfect X3 keyboard by choosing Tools, Settings, Customize, and then clicking the Keyboards tab and selecting the WPWin Keyboard.

For detailed information on the keystrokes and features of the Classic mode, choose Help, Help Topics, click the Index tab, and type **`classic mode`**.

CHANGING TO THE LEGAL MODE

The Legal workspace is more like WordPerfect X3 than the Word or Classic modes. All that really happens when you choose Tools, Workspace, Legal Mode is that WordPerfect displays an additional Legal toolbar (see Figure 2.12).

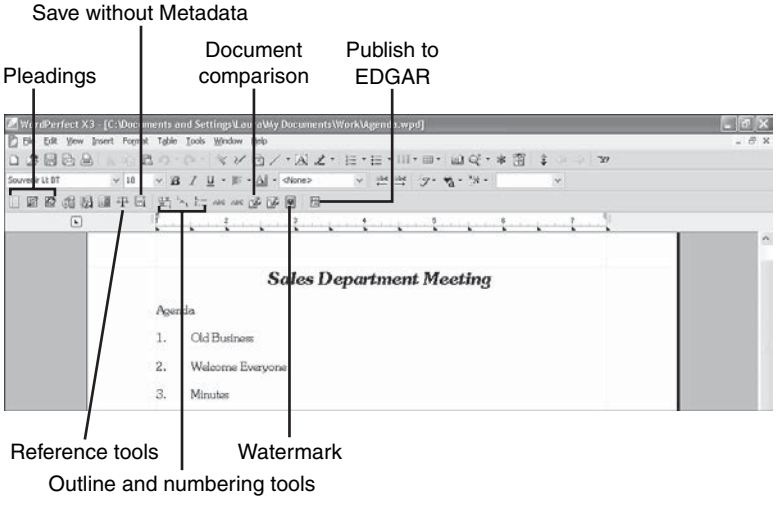


Figure 2.12
The Legal toolbar provides several WordPerfect options that assist in preparing legal documents in one convenient location.

All the features made available through the Legal toolbar are also available in the menus or elsewhere in WordPerfect. However, the buttons on this toolbar make it easier to access those features you'll likely need as you prepare legal documents.

Details for using these features can be found in various chapters throughout this book. For example, Chapter 12, "Adding Graphics to Your Document," covers graphic lines, and Chapter 7, "Formatting Lines and Paragraphs," describes the use of line spacing and paragraph formatting.

➔ For information on reference tools such as tables of contents or of authorities, **see** Chapter 16, "Generating Tables, Indexes, and Lists."

➔ For information on redline, strikeout, or comparing documents, **see** Chapter 14, "Collaborating on Documents."

➔ For information on inserting vertical lines or graphic watermarks, **see** Chapter 12, "Adding Graphics to Your Document."

➔ For information on using automatic outlining, **see** Chapter 11, "Organizing Information with Lists and Outlines."

WORKING WITH REVEAL CODES

Opening the Reveal Codes window is like taking a look under the hood of a car. You're raising the hood of a document to see exactly how the formatting codes control the appearance and flow of the text. For many, this is the single most important distinguishing feature between WordPerfect and other word processing programs. Some people love using the feature, whereas others don't. But even the critics have to admit that Reveal Codes does give you complete control over your document.

TURNING ON REVEAL CODES

When you turn on Reveal Codes, the document window is split in half. The Reveal Codes window takes up the lower half of the screen (see Figure 2.13). In this window, you see a duplicate of the text in the document window, except in the Reveal Codes window, the codes are displayed along with the text.

The placement of the codes controls the appearance. You read through the codes just like you read a book—from left to right. A code takes effect where it is placed and remains in effect until another matching code is reached. For example, if you change the top margin, the change stays in effect until the end of the document, or until another top margin code is found.

There are two types of codes: paired and open. *Paired* codes have an On code and an Off code. The On code is at the beginning of the affected text; the Off code is at the end. For example, if you boldface a title, you will see a Bold On code at the beginning of the title and a Bold Off code at the end. An open code, such as a margin change or a hard return, stands alone. If you want to make changes, you simply edit the codes or delete them altogether.

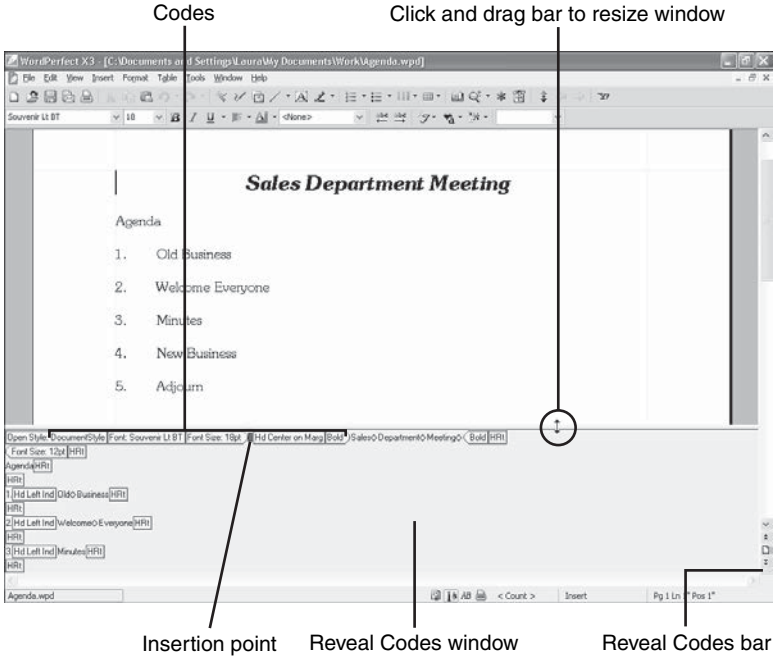


Figure 2.13
The Reveal Codes screen enables you to view what's controlling the format of your document.

You can use any of the following methods to turn Reveal Codes on and off:

- Choose View, Reveal Codes.
- Press Alt+F3.
- Right-click the editing screen and choose Reveal Codes from the QuickMenu.
- Drag the Reveal Codes bar located at the bottom of the vertical scrollbar (refer to Figure 2.14).

Codes appear in the Reveal Codes screen as buttons mixed in with the text. The insertion point is shown as a small red box. You can reposition the insertion point by clicking the mouse in the Reveal Codes window, in addition to using the usual mouse and keyboard methods.

NOTE

> When Reveal Codes is off, Delete and Backspace remove text but don't necessarily delete formatting codes. In Reveal Codes, WordPerfect assumes that you see the codes, and that you intend to delete them when you use Delete or Backspace. If you accidentally delete a formatting code, just use Undo to restore it.

Generally, when you make a change in your WordPerfect document, you do so at the insertion point. Sometimes you make changes that you don't even see but that cause problems with the document's formatting. Reveal Codes enables you to find errant codes and delete

them. Simply position the insertion point before or after the code and press Delete or Backspace as appropriate.

WordPerfect automatically places certain codes at the appropriate location. For example, codes that clearly affect paragraphs, such as margin or tab settings, are placed at the beginning of the paragraph in which the insertion point is resting. Codes that pertain to pages, such as page numbering or headers, are placed at the beginning of the current page.

You can also use the mouse in the Reveal Codes screen to delete or edit codes:

- You can delete codes by clicking and dragging them out of the Reveal Codes screen (see Figure 2.14).

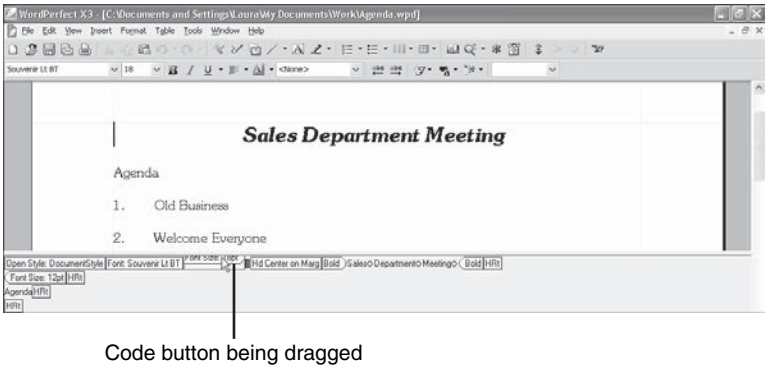


Figure 2.14
You can use the mouse to drag codes out of the Reveal Codes screen to delete them.

- The quickest way to make formatting adjustments is to edit the code. Simply double-click the code in the Reveal Codes window. This opens the corresponding dialog box where you can make the necessary changes. When you close the dialog box, your changes are saved.

As you work through these chapters, turn on Reveal Codes every now and then so you can see that the selections you make in dialog boxes result in the insertion of codes. These codes control the formatting of a document.

The order of the codes is important. If you are having trouble figuring out why something is happening, the first thing you should do is turn on Reveal Codes and check the order of the codes. In many cases, all you need to do is rearrange the order of the codes or delete the codes causing trouble. Incidentally, you can select and move or copy codes in the Reveal Codes window using the same techniques that you learned in Chapter 2, "Opening and Editing Documents."

PRINTING THE CODES

Another great troubleshooting tool is a handy feature that was first introduced in WordPerfect 11. You can now print out the codes with the document text. No more scrolling through a document to troubleshoot a problem. Just print out the affected pages

and review the codes on paper. They are much bigger on the printed page, and they have a gray background so that they stand out from the rest of the text.

To print codes with the text

1. Choose File, Print (Ctrl+P) to open the Print dialog box.
2. Select the pages that you want to print.
3. Click the Advanced tab.
4. Enable the Print Reveal Codes check box.
5. Choose Print.

Having trouble seeing a Reveal Codes window? See "Sizing the Reveal Codes Window" in the Troubleshooting section at the end of this chapter.

EDITING MORE THAN ONE DOCUMENT

If your desk looks anything like mine, you know that we rarely work on just one thing at a time. While we're correcting the annual report, someone calls and asks for the action list from last week's conference call.

Fortunately, WordPerfect makes it easy for us to work this way by giving us up to nine separate document windows.

To open a document in another WordPerfect window, choose File, Open and then open the document. If you want to open more than one file at a time, simply hold down the Ctrl key, click each file you intend to open and then click Open. WordPerfect can open up to nine documents at once.

To create a new document, click the New Blank Document icon on the toolbar. You can also choose File, New, or press Ctrl+N.

When you have more than one document open, you have to remember what documents you have open and learn to jump quickly from one document to another. WordPerfect's title bar displays the name of the currently active document window, whereas the application bar displays the titles of all open documents (see Figure 2.15).

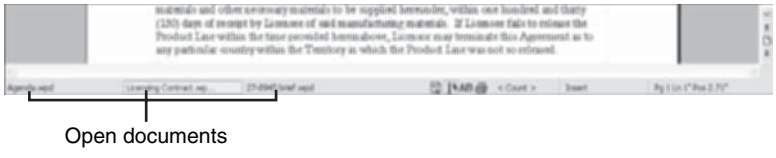
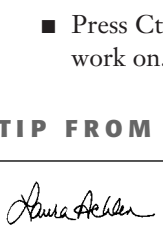


Figure 2.15
Tabs on the application bar display each open WordPerfect document. Clicking a document enables you to switch to that document.

You can switch from one document to another by using any of the following methods:

- On the application bar, click the name of the document you want to work on and WordPerfect opens that window for you.
- Open the Window menu and then click the document you want.
- Press Ctrl+F6 repeatedly until WordPerfect displays the document you want to work on.

TIP FROM



Remember that you can copy and paste from one document to another. Simply cut or copy while viewing one document, and then switch to another document and paste.

➔ To learn more details about moving information from one WordPerfect document to another, including drag and drop, or information about WordPerfect's Clipboook program, **see** Chapter 13, "Importing Data and Working with Other Programs."

TROUBLESHOOTING

PASTING THINGS CORRECTLY

Sometimes when I paste, I get something other than what I wanted to copy.

The Windows Clipboard remembers the last thing you copied or cut. When you paste something you previously copied or cut, this is because you didn't cut or copy correctly. Simply undo what you pasted, and then go back and cut or copy the selection again.

Consider using the Clipbook program instead. You'll be able to save multiple clips to a clipboard. You can have multiple clipboards so the possibilities are endless. See "Using the Clipbook Program" in Chapter 13, "Importing Data and Working with Other Programs" for more information.

SETTING THE DEFAULT FOLDER

When I open the Open File dialog box, I can't seem to make the default folder what I want it to be.

Even if you turn off the Change Default Folder option, WordPerfect still remembers the last folder you were in. Choose File, Open. Toggle the menu on if necessary, and then choose Edit, Change Default Folder (make sure there is a check mark beside this menu item). Next, browse to the folder you want to become the default folder, and then click Close. Choose File, Open again and choose Edit, Change Default Folder to turn off this feature, and choose Close. Now, each time you open the Open File dialog box, you'll find yourself in the correct default folder.

Note that after you exit WordPerfect, the Open File dialog box opens to the default folder (for example, c:\My Documents) specified in your settings. Therefore, if you want to change the default folder that appears the first time you open the Open File dialog box,

change the folder specified in Settings. Choose Tools, Settings, Files. If necessary, click the Document tab. Either type the name of the folder, or use the Files icon to locate the folder that you want selected in the Default document folder text box.

SIZING THE REVEAL CODES WINDOW

Even if I choose View, Reveal Codes, I still don't see a Reveal Codes window.

If you dragged the Reveal Codes bar to size the Reveal Codes window, you might have sized it so small that you don't realize the window is open. When you turn on Reveal Codes, if you see a solid gray bar at the bottom of the document window, you must drag this bar up to make a larger Reveal Codes window. You can also drag the bar completely to the bottom of the screen to turn off the Reveal Codes window.

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CHAPTER 3

Learning Essential Formatting Techniques

In this chapter

by Laura Acklen

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Emphasizing Important Text 64

Changing Margins by Using Guidelines 67

Justifying Text 69

Using QuickBullets 70

Inserting Special Characters 72

Getting a Word Count 74

Troubleshooting 75

CHOOSING THE RIGHT FONT

What can you do to transform a plain vanilla document into something that a reader would forward to reviewing? Choose attractive fonts to generate interest in your subject. Make the titles and headings larger than the body text so that they really stand out. It only takes a few minutes, and the results are well worth your effort.

There are 900 fonts included with WordPerfect Office X3. Of these, 24 are the character set fonts, which contain the symbols and foreign language alphabets. During a typical installation, a default set of fonts is installed. The rest can be installed separately, using either the Install Wizard or the Windows Fonts folder. To use the Fonts folder, choose Start, Control Panel, Fonts. In the Fonts dialog box, choose File, Install New Font and follow the prompts.

CAUTION

As you format your document, remember to always, always, always position the insertion point first. As a general rule, your changes take effect at the insertion point, which may or may not be where you want them. If you forget and get some unexpected results, you've got a safety net: You can click the Undo button to reverse the last action (or continue clicking to reverse the last several actions).

SELECTING FONTS

The quickest way to choose a different font is to click the Font Face drop-down arrow on the property bar. A drop-down list of fonts appears, and a large preview window pops up at the top of the document (see Figure 3.1). As you point to a font in the list, the sample text in the preview window morphs into that font. Thanks to Real Time Preview, the text in the document does the same thing. You don't have to play guessing games, trying to figure out how a font will look from a tiny piece of sample text—you can see how a whole page of text will look. When you find the font that you want, click it.

CAUTION

When you're changing the font (or font size) for existing text, such as a title or heading, select it first. Otherwise, the new font (or size) takes effect at the insertion point and stays in effect for the rest of the document (unless, of course, you change the font or size again later).

SELECTING FONT SIZES

Choosing a different font size works essentially the same way as choosing a different font. Click the Font Size drop-down arrow on the property bar to open a drop-down list of sizes. If you click the scroll arrows, you'll see that the list has sizes ranging from 6 points to 72 points. A *point* is a unit of measurement used to describe the size of a font. A 72-point character is 1" tall; a 36-point character is 1/2" tall, and so forth.

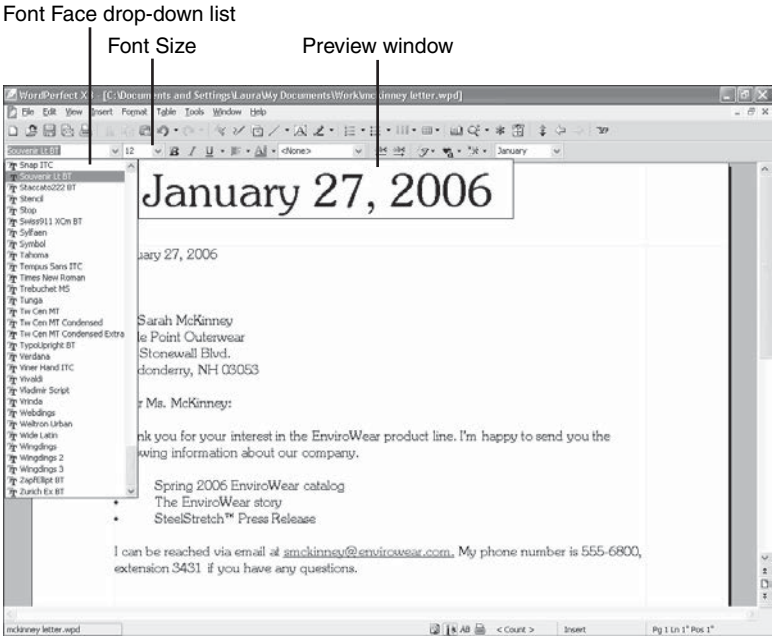


Figure 3.1
As you hover over fonts in the drop-down list, the sample text in the preview window and the text in the document morph into that font.

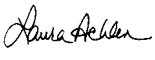
A preview window with sample text opens next to the list. As you move the mouse down through the list, the sample text and the document text expand and contract to show the new size.

TIP FROM

If you want to use a font size that isn't in the list, click the Font Size box (to select the current size), then type the size you want, then press Enter.

When you've decided which font you want to use for the body text, set that as the default font for the document. Likewise, if you select a font that you want to use for most, if not all, your documents, set that as the default for all *new* documents. Choose Format, Font to open the Font Properties dialog box. Make your selections, and then choose Settings. Choose Set Face and Point Size As Default for This Document *or* Set Face and Point Size As Default for All Documents.

TIP FROM



Have you ever been stuck making last-minute changes to a document on a machine that didn't have the same fonts installed? What was once a logistical nightmare is now completely painless, thanks to font-embedding technology. You can save fonts with a document so they go where the document goes. When you save a file, choose Embed Fonts using TrueDoc™ in the Save As dialog box. WordPerfect compresses the fonts and saves them with the file.

TIP FROM

Laura Acklen

Ever wish you had a "font catalog" that you could flip through? WordPerfect includes a nifty macro that prints out a sample of the fonts on your system. Choose Tools, Macro, Play, and then double-click the Allfonts icon. Bear in mind that if you have hundreds of fonts on your system (and who doesn't) it will take a while to build the document. It will also take a while to print and may overload your printer, depending on how much printer memory you have. If you are unable to print the entire font document, try breaking it up into several pieces.

➔ To find a list of all the macros that ship with WordPerfect, along with the steps to create your own macros, **see** "Running the Shipping Macros," **p. 570**.

SELECTING RECENTLY USED FONTS BY USING QUICKFONTS

Say you're formatting a lengthy report. You're finished experimenting, so you know which fonts you want to use for your headings and key terms. Even with the Font Face and Font Size drop-down lists, reselecting the same fonts and sizes over and over is tedious.

QuickFonts to the rescue! The last 10 fonts (with sizes and effects) you selected are kept in the QuickFonts list for fast access. Click the QuickFonts button on the property bar (see Figure 3.2), and then click the font you want to reuse. Sorry—no Real Time Preview here.

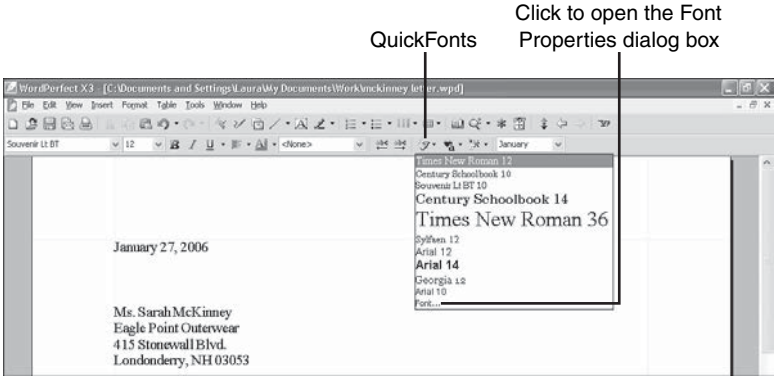


Figure 3.2
Click the QuickFonts button to select from the 10 most recently used fonts.

EMPHASIZING IMPORTANT TEXT

When you speak, you use inflection for emphasis. To get an important point across, you might raise your voice and enunciate each word slowly and clearly. This gets the audience's attention and it gives a point of reference.

You can do the same thing with your printed document. Judicious use of bold, italic, underline, and other effects can guide a reader through the text and draw attention to key points. You have to be careful not to use these elements too much or you risk distracting the reader.

NOTE

> Don't get carried away with all the different fonts and font effects that you can choose from! A light touch is all you need. Too many fonts, too many effects, or too much color only frustrates the reader.
>
> Try to keep things simple: Don't use more than three or four fonts on a page, don't apply bold *and* italic *and* underline (all at once), don't apply color to long passages of text, don't use a bunch of different font sizes, and choose a font that suits the subject matter.

USING BOLD, ITALIC, AND UNDERLINE

Before there were gazillions of fonts to play with, the only way you could vary the look of the text was with bold, italic, and underline. These old standbys still have their place. The designers for the *Special Edition Using* books decided to use italic to point out important terms and to emphasize words. Titles and headings are bold so they really stand out. Screenshots illustrate WordPerfect's use of underlines for hotkeys. All of these things make it easier for you to understand the information being presented.

To apply bold, italic, or underline, select the text, and then click the Bold, Italic, or Underline button (or any combination of the three).

If you can't figure out why your bold, italic, and underline disappear after you change the font, see "Disappearing Act" in the Troubleshooting section at the end of this chapter.

ADDING COLOR

I can't remember the last time I printed a document for someone to read. Like many others, I use e-mail most of the time. I just attach the file to an e-mail message. The recipient opens it in his word processing program and reads it onscreen.

This method of reviewing documents gave me the excuse I needed to start adding color to my documents. I began using it to draw attention to titles and headings, and progressed to using it for key terms, statistics, quotes, references, headers and footers, and so on.

To add color to your text, follow these steps:

1. If you've already typed some text to which you want to add color, select the text you want to add color to. Otherwise, position the insertion point where you want to start typing the colored text.

CAUTION

> When you finish typing the colored text, you'll have to switch the color back to black. For this reason, it's easier to type the text, select it, and then choose the color.

2. Click the Font Color button on the property bar (see Figure 3.3).
3. Click one of the color boxes to choose one of the standard colors.

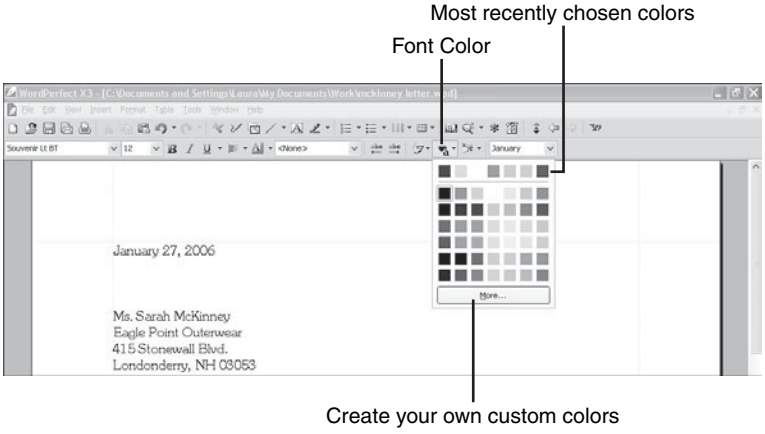
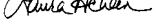


Figure 3.3
Clicking the Font Color button on the property bar is the fastest way to open the color palette. This palette is also available in the Font Properties dialog box.

TIP FROM



So, 42 colors aren't enough for you? When you've got to have just the right shade of blue/green (and you have a few minutes to play), choose More from the color palette to open the Select Color dialog box. Click anywhere on the color wheel to move the little selection box and display the color you've created in the New Color section. Now, click and drag the selection box on the vertical luminosity bar to the desired color intensity. You can then make minor adjustments by tweaking the numbers in the Color Values section.

TIP FROM

If you use the same colors over and over, you'll love this! WordPerfect places the last seven colors you've selected on the top row of the palette. I really appreciate this with the custom colors because I don't have to reselect them each time.

➔ To learn how to use the Highlight feature (instead of font color) to accentuate sections of text, **see** "Using the Highlight Tool," **p. 379**.

USING OTHER FONT EFFECTS

Bold, italic, underline, and color all have buttons on the property bar, so they are the easiest font effects to add. The other effects, also called *attributes*, are found in the Font Properties dialog box. First, position the insertion point where you want the effects to start (or select some existing text). Choose Format, Font or press F9 to open the Font Properties dialog box (see Figure 3.4).

The font attributes are listed in the Appearance section. As you select attributes, the sample text in the lower-left corner shows you how the attributes will look when applied to the text. The Real Time Preview feature pops up again here—WordPerfect pulls in a short section of text from your document and uses it as the sample text. (If you're working in a blank document, the sample text is the name of the currently selected font.) Click OK when you're done choosing effects.

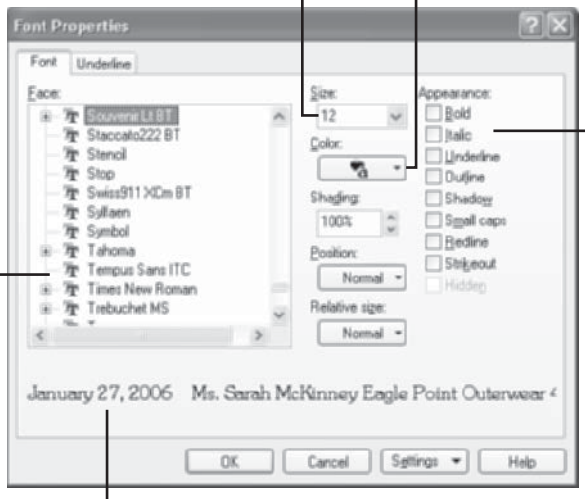


Figure 3.4
You can use the Font Properties dialog box if you need to set multiple font options or if you want to preview your changes first.

TIP FROM

If you use font attributes a lot, consider adding buttons for them to the toolbar. Or, create a new toolbar and add *all* your favorite buttons to it. Choose Tools, Settings, Customize. You can add to an existing toolbar, or you can create a new toolbar. To add a button to an existing toolbar, select the toolbar, and then choose Edit. Open the Feature Categories drop-down list and choose Format. Select the feature in the list, and then choose Add Button. When you are finished adding buttons, click OK to save your changes. To create a new toolbar, choose Create, type a name for the toolbar, and then click OK. Add buttons as previously described.

If you received an error message during setup saying that you had too many fonts selected, see "Too Many Fonts" in the Troubleshooting section at the end of this chapter.

If you're selecting options in the Appearance section of the Font Properties dialog box and the sample text isn't changing to reflect your changes, see "Disappearing Act" in the Troubleshooting section at the end of this chapter.

CHANGING MARGINS BY USING GUIDELINES

Believe it or not, you can make your document easier to read by adjusting the margins. A wider margin creates more whitespace around the text and limits the number of words on a line. The shorter the line, the less likely the reader is to lose her place.

On the other hand, if you're trying to keep the number of pages down, you might want to make the margins smaller so you can fit more on a page. For example, if you plan to use

headers and footers, you might want to cut the top and bottom margins down to 1/2 inch. By default, the margins are set to 1 inch on all sides (see Table 3.1 later in this chapter).

To adjust the margins, position the mouse pointer over a guideline and wait until the pointer changes into a double arrow. Click and drag the guideline. As you click and drag, you'll see a dotted guideline and a bubble. The dotted guideline shows you where the new margin will be, and the bubble tells you what the new margin will be (in inches) when you release the mouse button (see Figure 3.5).

CAUTION

> If you don't see the guidelines (as shown in Figure 3.5), someone might have turned them off on your system. Choose View, Guidelines, place a check mark next to Margins, and then choose OK.

If you accidentally drag a margin guideline and end up with wacky margins, see "Bad Dragging" in the Troubleshooting section at the end of this chapter.

NOTE

> If you're not a big fan of clicking and dragging, or if you just want to be more precise, you can make your changes in the Margins dialog box. Choose Format, Margins, and then either type the measurements in the text boxes or click the spinner arrows to bump the value up or down—in this case, 0.1 inch at a time.

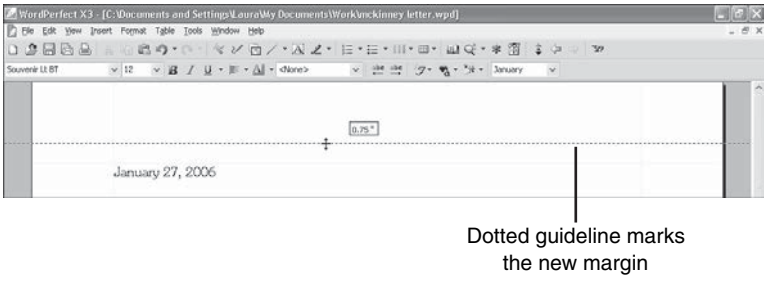


Figure 3.5
Clicking and dragging guidelines is the fastest way to adjust the margins. The dotted guideline and bubble show you what the new margins will be when you release the mouse button.

CAUTION

> Many printers (such as inkjet and laser printers) aren't capable of printing to the edge of the paper. This area is called the *unprintable zone*. The size of this zone varies from printer to printer, so the information is kept in the printer's setup. What does this mean? If you try to set a margin within the unprintable zone, WordPerfect automatically adjusts it to the printer's minimum margin setting.

JUSTIFYING TEXT

Justification controls how text flows between the left and right margins. The most obvious example of this is centering text on a line. WordPerfect does the math, and you get the same amount of space on the left and right sides. No matter what you do to the left and right margins, that text stays centered.

The default setting in WordPerfect is left justification, which creates a smooth left margin and a ragged right margin. The result is an open, informal appearance that is accessible and easy to read. For that reason, this book has been formatted with left justification.

There are four other justification options that you might be interested in, especially if you work with columns, newsletters, and formal documents (see Figure 3.6).

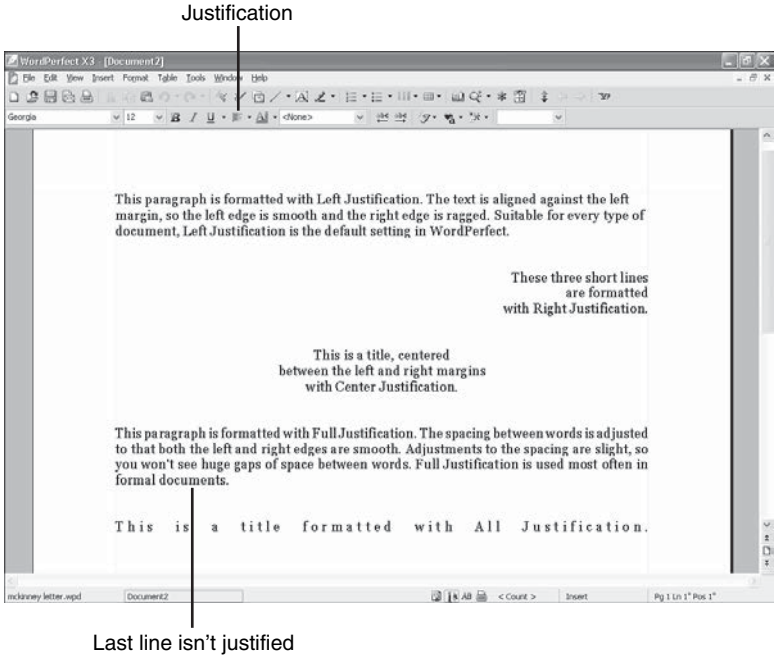


Figure 3.6
This sample document illustrates the different justification settings.

Before you choose which type of justification you want to use in your document, decide where you want the justification to take effect, and then move the insertion point there. This may be at the top of the document, the top of a column, or the beginning of a paragraph. If you want to apply justification to a section of text, such as a multiline title, select the text first.

Instead of using the menus, you can click the Justification button on the property bar, and then choose the justification setting from the pop-up list. This method offers an advantage over the others in that you get a Real Time Preview of each justification setting when you hover over it.

WordPerfect offers the following justification options:

- **Left**—Text is aligned against the left margin so the left margin is smooth and the right is ragged. It's suitable for almost every type of document, especially those with long passages of text. To apply left justification, choose Format, Justification, Left, or press Ctrl+L.
- **Right**—Text is aligned against the right margin so the right side is smooth and the left is ragged. The unique placement draws attention, but because it's hard to read, you might not want to use it on more than three or four lines. To apply right justification, choose Format, Justification, Right, or press Ctrl+R.
- **Center**—Text is centered between the left and right margins. It's common practice to center titles and headings to differentiate them from the rest of the text. To apply center justification, choose Format, Justification, Center, or press Ctrl+E.
- **Full**—Text is aligned against the left and right margins, so both edges are smooth. How? WordPerfect makes slight adjustments to the spacing between words so that each line extends from the left to the right margin. Full justification gives documents a more formal and organized appearance. To apply full justification, choose Format, Justification, Full, or press Ctrl+J.
- **All**—This type of justification stretches lines of text between the left and right margins, regardless of their length. Whereas full justification adjusts the spacing between words, all justification adjusts the spacing between letters as well. This setting is used for letterhead, informal titles and headings, and special effects. To apply all justification, choose Format, Justification, All.

CAUTION

With justification set to full, the last line in a paragraph won't be justified if it doesn't extend to the right margin (or pretty close to it). Refer to Figure 3.6 for an example of how this looks.

TIP FROM

Have you noticed that articles in the newspaper are formatted into columns with smooth left and right margins? When the column edges are well defined, side-by-side columns don't look cluttered or disorganized. You can achieve the same result by setting justification to full. This can be done before or after you type the text into columns.

➔ To learn how to define columns, **see** "Setting Up Columns," **p. 212**.

USING QUICKBULLETS

I use lists in all sorts of documents. They're easier to follow than long, drawn-out explanations, so readers really appreciate them. WordPerfect's QuickBullets feature makes it easy for you to create a bulleted list on-the-fly. Simply type a symbol, and then press Tab—WordPerfect converts the symbol to a bullet. Table 3.1 lists the QuickBullets symbols.

Inserting QuickBullets is easy when you use the following steps:

1. Choose the Tools menu and select QuickCorrect, Format-As-You-Go. If necessary, place a check mark next to the QuickBullets option.
2. Type one of the QuickBullets symbols, and then press Tab. As soon as you press Tab, WordPerfect converts the symbol to a bullet.

NOTE

If you type more than one line of text next to the bullet, you'll notice that the text automatically wraps under the text, not under the bullet. WordPerfect actually converts the tab to an indent so the list has the proper format.

3. Type the text, and then press Enter. Notice that you automatically get another bullet when you press Enter (see Figure 3.7).
4. When you are finished with the list, press Enter and then backspace to delete the bullet.

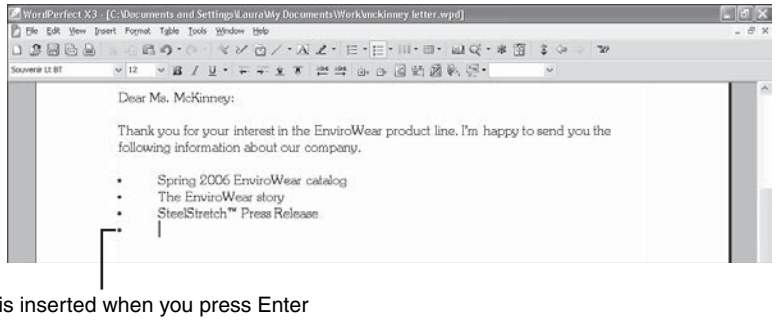


Figure 3.7
You can use the QuickBullets feature to create bulleted lists with just one or two keystrokes.

TIP FROM

If for some reason you don't like the QuickBullets feature, you can easily turn it off. Choose the Tools menu and select QuickCorrect, Format-As-You-Go. Deselect (that is, remove the check mark from) the QuickBullets option.

Table 3.1 lists the six bullet symbols you can create with symbols on the keyboard. You can also refer to the help topic on this for a quick reminder.

TABLE 3.1 QUICKBULLET SYMBOLS

Press This	To Get This
+ then Tab	✰
^ then Tab	◊
o or * then Tab	•
O then Tab	●
> then Tab	→
— then Tab	—

➔ To learn how to indent text, **see** "Indenting Text," **p. 176**.

➔ To learn how to insert bullets with the Bullets and Numbers dialog box, **see** "Working with Bulleted and Numbered Lists," **p. 284**.

INSERTING SPECIAL CHARACTERS

Special characters, or symbols, are one of the many areas where WordPerfect distinguishes itself from the competition. WordPerfect has more than 1,500 special characters, including entire foreign language alphabets, that you can insert anywhere in your document.

NOTE

Not all special characters are available in every font. Depending on the font you have selected, you may see empty boxes instead of special characters, which means that those characters aren't available. On the other hand, certain fonts, such as Wingdings, are composed entirely of special characters.

To insert special characters, follow these steps:

1. Click in the document where you want the special character to appear.
2. Press Ctrl+W or choose Insert, Symbols to open the Symbols dialog box (see Figure 3.8). You might need to scroll down to see the symbol you want.
3. If you don't see the character you need, open the Set drop-down list and then select a different character set from the list.
4. Select the symbol, and then choose Insert, or double-click a symbol in the list to insert it. The dialog box stays open to make it easier for you to insert other symbols. (If you want to move it, click and drag the title bar.) Choose Close when you are finished. If you only need to insert one symbol, choose Insert and Close instead.

If you see empty or black boxes instead of the special characters in the Symbols dialog box, see "Symbols Display As Empty or Black Boxes" in the Troubleshooting section at the end of this chapter.

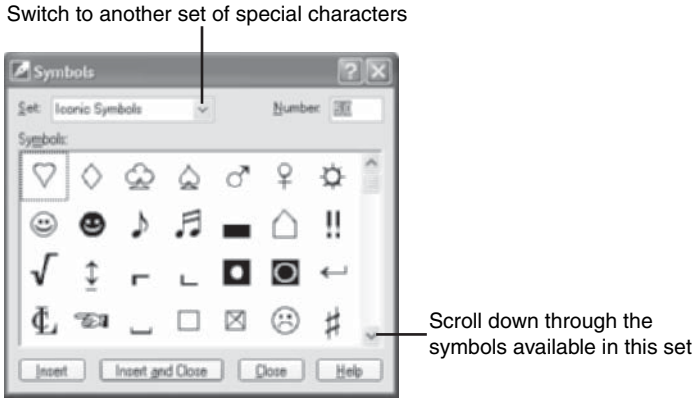


Figure 3.8
Through the Symbols dialog box, you can insert more than 1,500 symbols and characters from foreign language alphabets.

TIP FROM

If you insert the same symbols over and over, you'll appreciate this shortcut. The next time you select a symbol, look for the two numbers in the Number text box. Then, when you need to insert that character again, press Ctrl+W, type the two numbers (separated by a space or a comma), and then press Enter. For example, to insert the heart symbol shown in Figure 3.8, press Ctrl+W, type `5,0`; then, press Enter.

The QuickCorrect feature is designed to automatically correct common spelling errors and typos while you type. There are five common symbols that you can insert with QuickCorrect (see Table 3.2).

TABLE 3.2 CREATING SYMBOLS WITH QUICKCORRECT

To Get This	Type This
Copyright symbol	(c or (c)
Registered trademark symbol	(r or (r)
½	1/2
en dash (–)	-- or n-
em dash (—)	--- or m-

If you don't want QuickCorrect making these automatic replacements, you can take these symbols out of the list. Choose Tools, QuickCorrect. Select the entry you want to remove, and then choose Delete Entry.

GETTING A WORD COUNT

One of the most valuable tools that a writer can have is a word count feature. Author guidelines will clearly state a minimum or maximum word count as part of the instructions. Whether you are submitting a magazine article, a short story, a nonfiction work, or a school assignment, you'll need to pay close attention to the number of words in your document.

One of the new features in WordPerfect X3 is the ability to customize the way a word count is performed. In past versions, you could not exclude the following document elements from the count: headers/footers, comments, footnotes/endnotes, watermarks, text boxes, and box captions. Choose File, Properties, and then click the Word Count tab to display the word count options (see Figure 3.9).

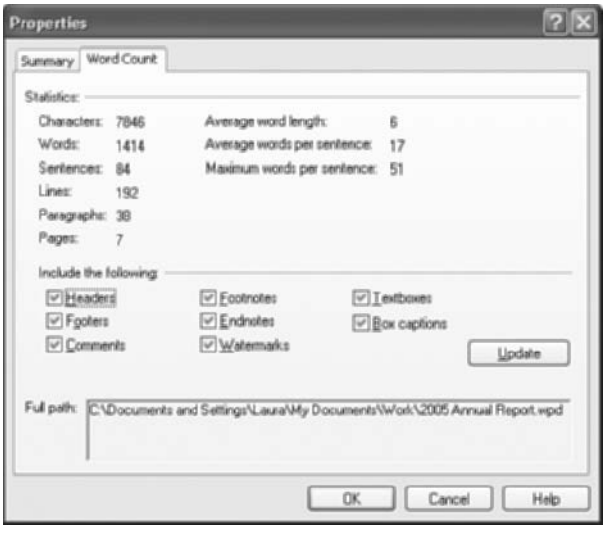


Figure 3.9
In the Word Count tab, you can disable the check boxes for those elements that you do not want included in a word count.

Also new in WordPerfect X3 is the Word Count button on the application bar (see Figure 3.10). The button displays <Count> by default. To initiate a word count, click the Word Count button. Once you do so, the number of words in the document appears on the button.

The Word Count button will not automatically reflect the number of words as you add or remove them from the document, but it does display a tilde (~) before the word count to let you know that the count has changed. When you are ready to update the word count, simply click the Word Count button.

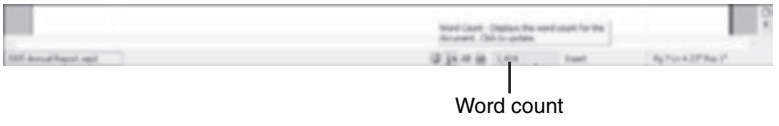


Figure 3.10
In the Word Count tab, you can disable the check boxes for the elements that you do not want included in a word count.

TROUBLESHOOTING

TOO MANY FONTS

During a custom installation, I got the error message "Too Many Fonts Selected" after I marked the fonts I wanted to install. The installation continued, but now I'm not sure which fonts were installed.

All the fonts you marked were copied to your hard drive, but not all of them were registered. There is a limit to the number of fonts that can be registered in the Windows Registry. When you exceed this limit, all sorts of problems can crop up—from fonts not displaying correctly to buttons showing symbols instead of text. I've seen conflicting reports on what the actual limitation is, but most technicians recommend that you keep a maximum of 300 fonts registered at one time. This number includes any fonts that you already had on your system (such as Windows fonts and fonts installed with other applications). I would suggest that you run a typical installation so that the character set fonts and default fonts are safely installed before you attempt to install additional fonts.

To see the fonts that are currently registered on your system, open the Fonts folder by choosing Start, Control Panel, Fonts. To make room for the WordPerfect fonts, select and delete the fonts that you don't use. Then choose File, Install New Font to add fonts that were copied to the hard drive but not registered during setup.

BAD DRAGGING

I accidentally grabbed a margin guideline with the mouse and before I knew what was happening, half my page had new margins. How do I fix this?

It's really faster to undo the change than to try to drag the guideline back to its original position. Either click the Undo button; choose Edit, Undo; or press Ctrl+Z.

If you save the document before trying Undo, you won't be able to undo the margin change because by default, the Undo information isn't saved. You can still reverse the margin change, though. Simply position the insertion point where the margin change begins, turn on Reveal Codes and delete the margin code. To delete the code, click and drag it out of the Reveal Codes window.

DISAPPEARING ACT

After spending 15 minutes selecting text and applying italics, I decided to change the font. Now all the text I italicized is back to normal. How do I restore the italics I originally had?

Sometimes changing the font causes your bold, italic, underline, or other font effects to disappear. Why? Because the new font doesn't support those effects. This doesn't happen very often—it occurs mostly with the more decorative fonts—but when it does, it's disconcerting. You can either switch to another font and see whether it supports them, or you can just forget about the effects.

SYMBOLS DISPLAY AS EMPTY OR BLACK BOXES

When I open the Symbols dialog box, I don't see the special characters that are shown in Figure 3.8. I see black boxes instead. How can I get the special characters back?

Sometimes the registry entries for the WP character font files get corrupted and you have to re-create them. To force Windows to rewrite the entries, you'll need to delete the files (send them to the Recycle Bin), and then restore them. Click Start, Control Panel, Fonts. In the Fonts folder, select all the fonts that begin with WP (everything between WP Arabic Sihafa and WP TypographicSymbols). Delete the files. Restart the computer. Double-click the Recycle Bin icon, and then select all the WP fonts. Choose File, Restore.

If the characters are still displayed as black boxes, you might need to delete and reinstall the fonts. Follow the steps given in the previous paragraph to delete the fonts. Run the WordPerfect Office setup program to install the fonts again. You'll have to restart the computer after you update the install. The characters should then display correctly in WordPerfect.

CHAPTER 4

Managing Your Files and Folders

In this chapter

by Laura Acklen

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ORGANIZING FILES AND FOLDERS

One of the most valuable skills you can learn is how to properly organize your files. Our increasing dependence on electronic copies of files has made it a matter of survival—you must be able to locate important information quickly.

Creating an electronic filing system is very similar to creating a system with manila folders, hanging folders, and filing cabinets. You decide how you want to group files (such as by client, project, department, or case number), and then you create a folder for those files. Existing files can be copied into the folder and new files can be saved there.

Every bit of this can be done within WordPerfect, so you don't even have to start My Computer or Explorer to get the job done. In every situation where you need to choose a file, you can do it in a file management dialog box. The figures in this chapter show the Open File dialog box, but no matter which file management dialog box you're in (it could be Save File, Insert File, Insert Image, Play Macro, or any other), you have the same capabilities.

SELECTING FILES TO WORK WITH

You probably already know how to select a file—you just click it. And you might know how to select a group of files with the Ctrl and Shift keys. What you might not know is that you can rearrange the list to make it easier to group files together.

Here are two methods for selecting multiple files:

- To select a group of files that are listed one right after the other, click the first file, hold down the Shift key, and then click the last file. Everything between the first click and the second click is selected (see Figure 4.1).

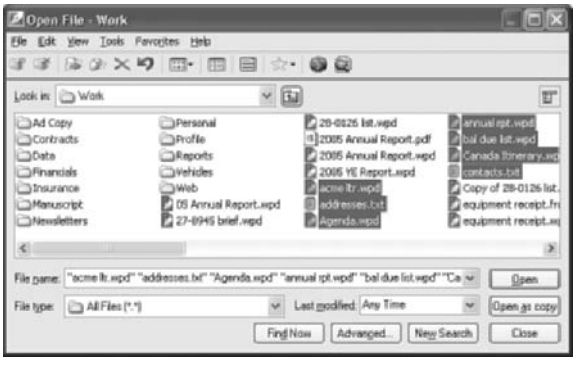


Figure 4.1
By using the Shift key, you can select a list of files in just two clicks.

- To select a group of files that are scattered throughout the list, click the first file, hold down the Ctrl key, and then click the other files, one at a time. While you're selecting, you can scroll up or down through the list, but you can't switch to another folder.

TIP FROM

If you accidentally select the wrong files, you don't have to start over. Just hold down the Ctrl key and click the offending files.

If you're having a hard time selecting multiple files, see "Can't Select Multiple Files" in the Troubleshooting section at the end of this chapter.

The following are methods for grouping files:

- To group files with similar names, type all or part of the name in the File Name text box. For example, to display only files that begin with "west", type **`west*`**, and then press Enter. The resulting list of files contains only files that begin with "west" (regardless of what follows "west" in the filename). The asterisk is a *wildcard*: You can use it to represent one or more characters in a filename.
- To arrange files differently, choose View, Arrange Icons By. Choose Name to arrange files in alphabetical order. Choose Type to arrange files by type (such as documents, presentations, and spreadsheets). Choose Size to arrange files from smallest to largest. Choose Modified to arrange files from the most recently edited to the least recently edited. To return to the default arrangement, choose Name.

- To view additional file details, choose View, Details or click the Views button and then click Details (see Figure 4.2). In the Details view, you can click a column heading to sort the list by that item. Click the column heading once to sort in ascending order; click again to sort in descending order.
- To view a particular type of file, click the File Type drop-down list arrow and select a file type from the list. Choose All Files (`*.*`) to reset the file list.
- To view files that were modified within a specific time frame, click the Last Modified drop-down list arrow and select a time frame from the list.

CAUTION

Any changes you make in the Details view are "sticky," which means they remain in effect even after you switch to another view. For example, if you sort the files by date, and then switch back to List view, the files remain grouped by date, even though you can't see the file dates in the list.

TIP FROM

After you've grouped your files, you can print a list for future reference (or just because you want to be able to put a check mark next to each one when you're finished with it). Choose File, Print File List, select the options you want in the Print File List dialog box, and then click OK. If you've selected files and you want to print a list of only those files, make sure you select the Print List of Selected Entries option in the Listing Options section.

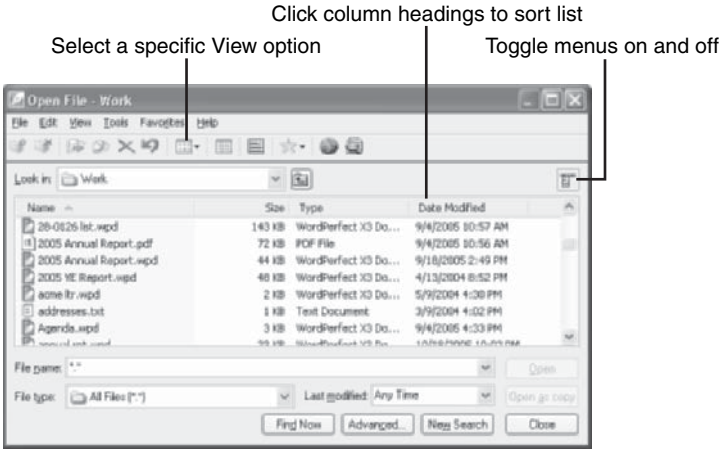


Figure 4.2
Grouping files makes it easy to sort by a specific criterion.

ADDING ITEMS TO THE FAVORITES FOLDER

When I first started surfing the Net, it didn't take long before I wanted to bookmark my favorite sites so I didn't have to remember, and type in, the exact addresses. You can do the same thing with folders—you can create a list of frequently used files and folders so you don't have to navigate through the labyrinth of drives and folders every time you want to grab a file.

Windows has a special place to put this list—it's called the Favorites folder. It's a Windows feature, so it's not specific to WordPerfect. This is important because you're likely to see items in the Favorites folder that have been added in other applications (such as your Internet browser).

You can add items to the Favorites folder from any file management dialog box. Here are the steps for adding folders, drives, and files:

- To add a drive, open it in the list, and then choose Favorites, Add, Add Favorite Folder. Alternatively, click the Favorites button on the toolbar and choose Add Favorites Folder. A shortcut to the drive is added to the Favorites folder.
- To add a folder, open it in the file list. Choose Favorites, Add, Add Favorite Folder. Alternatively, click the Favorites button on the toolbar and choose Add Favorites Folder. WordPerfect displays a message stating that `*.*` is the current filter, and asks if you want to save the Favorite with that filter. Choose Yes. A shortcut to the folder is added to the Favorites folder.

CAUTION

In the previous two items, the steps won't work if you *select* the drive or folder, rather than *open* it. Just make sure you read the items in the Add menu carefully before you select one.

- To add a file, select it in the list, and then choose Favorites, Add, Add Favorite Item. Alternatively, click the Favorites button on the toolbar and choose Add Favorites Item. A shortcut to the file is added to the Favorites folder.

After you've added a bunch of items to the Favorites folder and you're ready to use them, click the Favorites button and choose Go To Favorites, or choose Favorites, Go To/From Favorites. The file list displays the contents of the Favorites folder (see Figure 4.3).

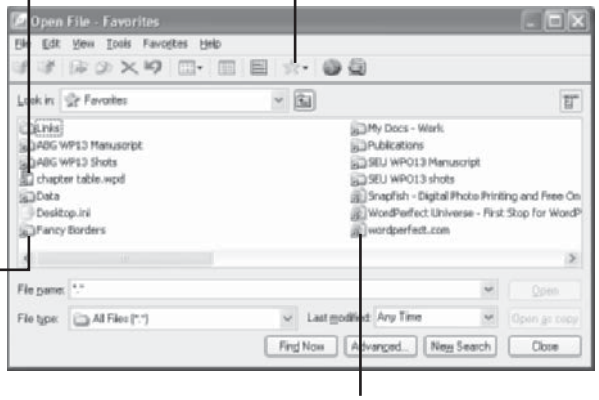


Figure 4.3
The Favorites folder contains shortcuts to frequently used items such as drives, folders, and files, as well as items that have been added in other Windows applications.

There are different types of shortcut icons for folders, files, and Web pages. You double-click a folder shortcut to switch to that folder and double-click a file shortcut to open that file. If Windows doesn't know which application to use to open the file, it prompts you to pick one (this shouldn't be a problem with WordPerfect documents). In the case of shortcuts to Web pages, Internet Explorer is launched and the Web page is opened inside the file management window.

If you can't get one of your shortcuts to work, see "My Shortcut Stopped Working" in the Troubleshooting section at the end of this chapter.

After a while, you'll have quite a collection of shortcuts in the Favorites folder, and finding the one you want will take a little longer. At that point, you should create some folders for related shortcuts. You might already be familiar with this concept if you've been keeping URLs for your favorite Web sites organized into folders in your Web browser's Favorites or bookmarks list.

You can create folders and move shortcuts by using the same techniques that are described in the next section, so read on for more information.

MANAGING FILES AND FOLDERS

Now that you can select and group files, you're ready to roll up your sleeves and get some things done. Most of the commands you'll need are on the File menu and the QuickMenu. To open a QuickMenu, right-click a file or folder (see Figure 4.4).

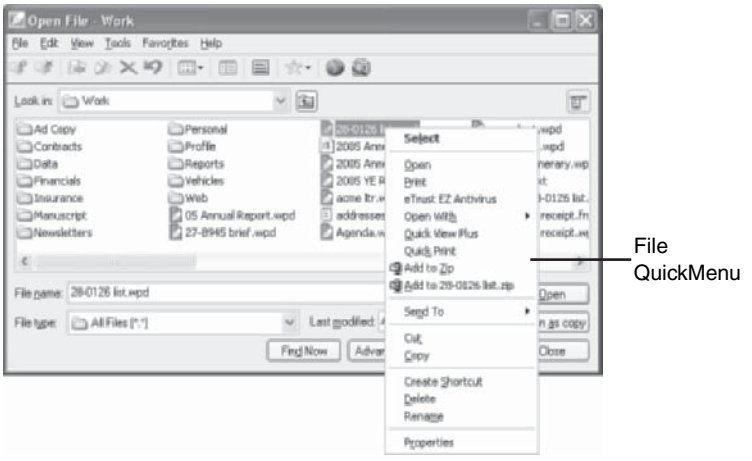


Figure 4.4
The file QuickMenu has all the commands you need to effectively manage your files from within WordPerfect.

NOTE

Depending on what you have selected, the options on a QuickMenu (and the File menu) change. For example, the file QuickMenu has Rename and Print; the folder QuickMenu has Explore and Search. Also, if you've toggled the menu bar off (by clicking the Toggle Menu On/Off button), you can still get to the file commands with the QuickMenu.

MOVING FILES AND FOLDERS

Occasionally, a file (or folder) gets saved to the wrong folder and you need to move it. You don't want to copy it because then you'll have two copies of the same file (or folder). To move a file (or folder), follow these steps:

1. Right-click the file (or folder) and choose Cut; or select it and then click the Cut button.
2. Switch to the folder where you want to store the file (or folder).

3. Right-click anywhere in the file list, and then choose Paste; or, just click the Paste button.

TIP FROM

Depending on your operating system, you might have a couple of extra commands on your File or Edit menu. Move to Folder is used to move files and folders (a file must be selected for this item to appear). Rather than switch to the destination folder, you can choose it from the Move Items dialog box. This way, you don't have to navigate back to the original folder after you've pasted the file (or folder). While we're on the subject, there is a Copy to Folder command that you can use as well—it works the same way as the Move to Folder command. These two commands are not available in Windows 98. They are both available in Windows 2000 on the File menu, and in Windows XP on the Edit menu.

If you can't find a file that you just moved, see "Misplaced Files" in the Troubleshooting section at the end of this chapter.

COPYING FILES AND FOLDERS

Network administrators implement security measures so that your co-workers can't get into your folders and accidentally delete or modify your files. If you want to share your files, you can usually copy them to someone else's folder or to a shared area on the network. Because you do the copying, you maintain control over who has access to your files.

➔ To learn more about sharing documents, **see** Chapter 14, "Collaborating on Documents."

To copy a file (or folder), follow these steps:

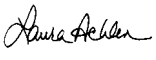
1. Right-click the file (or folder) and then choose Copy. Or, you can select the file (or folder) and click the Copy button.
2. Switch to the folder where you want to store the file (or folder).

3. Right-click anywhere in the file list, and then choose Paste; or, click the Paste button.

CAUTION

If you select a second file, a group of files, or a folder, and choose Cut or Copy before you paste, you'll lose the information for that item. You have to go back to the folder where the original items were located and cut or copy the file(s) again.

TIP FROM



The best way to ensure the integrity and accuracy of your documents is to keep a copy of every file you share. If a person using one of your documents makes any changes, either accidentally or on purpose, you're protected because you still have a clean copy.

RENAMING FILES AND FOLDERS

When you create a folder or save a file, you try to give it a descriptive name. Later, however, that name might no longer seem appropriate. To rename a file or folder, select it and then choose File, Rename. You can also right-click the file or folder, and then choose

Rename. An editing box appears around the file (or folder) name, and the name is selected (see Figure 4.5). Type the new name and then press Enter.

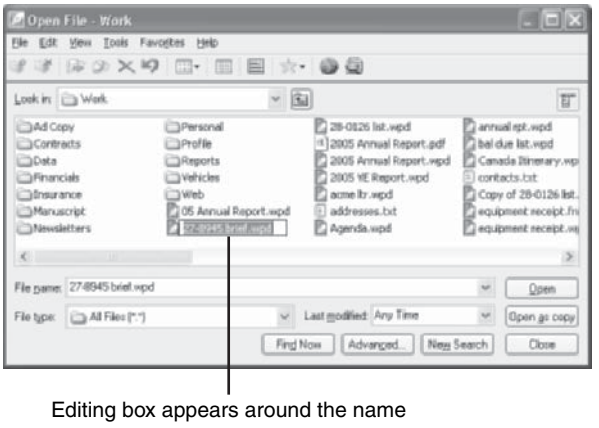


Figure 4.5
You can always change a file or folder name later.

There is one other method for renaming files and folders that doesn't require selecting from a menu. Click the filename or folder name (not the icon), pause, and then click the name again. The editing box should appear. Type the new name and then press Enter.

CAUTION

> You can't rename a file that is currently open, either in your application or in someone else's (if you're working on a networked computer).

If you're clicking a file twice and you can't get the editing box to appear, see "Can't Click Twice to Rename" in the Troubleshooting section at the end of the chapter.

DELETING FILES AND FOLDERS

Periodic housekeeping is an important part of managing your files. One method for keeping your drives uncluttered is to archive folders and files that you no longer use. You might decide to move these onto floppy disks, Zip disks, or CDs. The important thing is that you aren't getting rid of them permanently—if the need arises, you can always get to the archive copy.

If you decide that you'll never, ever, ever need a file or folder again, you can delete it from the drive. Select the file(s) or folder(s) in the list and either press the Delete key or click the Delete button. Alternatively, you can right-click the file or folder and then choose Delete from the QuickMenu. If necessary, choose Yes to confirm the deletion.

CAUTION

> Be extremely careful about removing folders. Deleting a folder removes all the subfolders and files within that folder.

When you delete files and folders from a local drive, Windows moves them to the Recycle Bin (see Figure 4.6). (Files deleted from a floppy disk or removable drive aren't moved to the Recycle Bin.) The good news is that you can get an accidentally deleted file or folder back. To restore a file or folder, open the Recycle Bin, select the file(s) or folder(s) you didn't really mean to throw away, and choose File, Restore.

The bad news about the Recycle Bin is that when you delete a file or folder and it goes to the Recycle Bin, you haven't actually freed up any disk space. To physically remove deleted files and folders, open the Recycle Bin and choose File, Empty Recycle Bin. Just make sure you look them over carefully, because after you empty the Recycle Bin, they are gone for good!

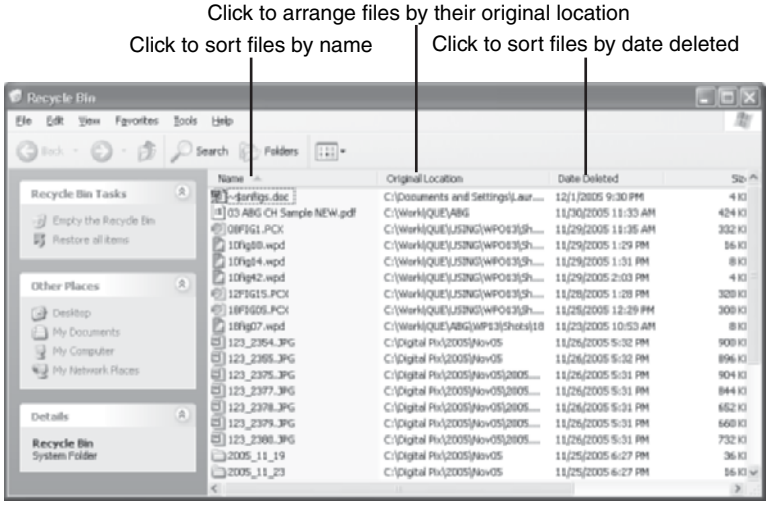


Figure 4.6
The Recycle Bin is the ultimate safety net. If you accidentally delete files or folders, you can restore them to their original locations from the Recycle Bin.

COPYING FILES TO A FLOPPY DISK

Electronic mail has revolutionized our capability to share files with one another. Unfortunately, not everyone has an e-mail address, so sometimes you share files the old-fashioned way: You copy the files to a disk and send the disk to the person who needs the file or folder. To copy a file to a floppy disk, select it and then choose File, Send To (or right-click it and choose Send To). Choose 3 1/2 Floppy.

TIP FROM

I don't need to give you a speech about how important it is to back up your files. Sooner or later, you'll find out for yourself. What I can tell you is this: Copy important files to removable media, such as a floppy disk, CD, DVD, or memory stick, at the end of the day. You'll sleep better at night. You can use the Send To command on the QuickMenu to copy files (and folders, if necessary) so it only takes a minute.

SENDING FILES VIA E-MAIL

If you have e-mail capabilities, you can send a file directly from a file management dialog box. The Mail Recipient command in a file management dialog box works the same way as the Mail Recipient command in the document window. The difference is that in a file management dialog box, you can only send selected text, or a file as an attachment; you can't send the file as a message.

To send a file, right-click it and then choose Send To, Mail Recipient (or select the file and choose File, Send To, Mail Recipient). If the Choose Profile dialog box appears, select a profile from the drop-down list. WordPerfect switches you to your mail program and attaches the document to an e-mail message (see Figure 4.7). You can type your message text, and then address and send the message as you normally would.

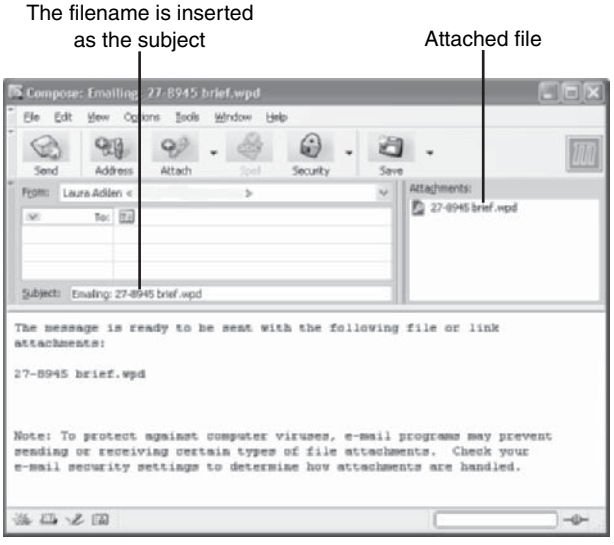


Figure 4.7
You can send files as attachments to e-mail messages from within a file management dialog box.

TIP FROM

Downloading large files can really be a pain. Be nice and zip up your files with a file compression utility. One of the most popular is WinZip, a shareware program that you can download from `http://www.winzip.com`. After you install it, you'll see an option on the QuickMenu to add the file(s) or folder(s) to a Zip file.

➔ To learn more about sending files, **see** "Sending Documents via E-Mail," **p. 165**.

CONNECTING TO NETWORK DRIVES

If you're connected to a network, you can map to a network drive from within a file management dialog box. Choose Tools, Map Network Drive, or if your menus are turned off, click the Map Drive button. In the Map Network Drive dialog box, select a drive from the

Drive list box, and then type the path in the Folder text box. (Don't forget to start the pathname with \\.)

When you're ready to disconnect from this drive, choose Tools, Disconnect Network Drive, or click the Disconnect button. Select the drive, and then click OK.

CAUTION

> If the drive doesn't map to the path you've typed, you might not have rights to that area of the network. Consult your network administrator.

CREATING SHORTCUTS ON THE DESKTOP

There is a shared folder on my network where anyone can copy files for others to use. I open that folder a dozen times a day to retrieve all sorts of files. I can't access it from within an application because I don't always know what type of file I'll be getting—it could be a spreadsheet, a document, or a presentation. So, I created a shortcut to that folder on my desktop. Now all I have to do is open the folder and double-click the file that I need. If all goes well, the originating application loads and opens the file for me.

To create a shortcut to a folder, select the folder, and then choose File, Send To, Desktop (create shortcut). You can also right-click the file and choose Send To, Desktop (create shortcut).

Now let's turn to those files that you open over and over during the day: lists of mobile phone numbers, account numbers for shipping services, timesheets, project tracking tables—any file that you use often. Normally, you would load an application and then open the file. With a shortcut to the file on the desktop, all you have to do is double-click the shortcut icon to load the application and open the file.

To create a shortcut to a file, select the file, and then choose File, Send To, Desktop (create shortcut). You can also right-click the file and choose Send To, Desktop (create shortcut).

CAUTION

> When you double-click a file in Explorer or My Computer, Windows loads the application that is associated with that file and then opens the file. The same thing happens when you double-click a shortcut to a file on the desktop. This might seem like magic, but it really boils down to how file extensions are associated with applications in the Windows Registry. For various reasons, Windows might not know which application to load for a particular file. If this happens, you will be prompted to select an application from a list.

When WordPerfect creates shortcuts on the desktop, it uses the name of the file or folder for the shortcut. You can assign a more descriptive name by using the same technique you use for renaming files (discussed in the "Renaming Files and Folders" section earlier in this chapter).

If one of your shortcuts has mysteriously stopped working, see "My Shortcut Stopped Working" in the Troubleshooting section at the end of this chapter.

PROTECTING SENSITIVE FILES

With the increasing popularity of flexible work hours and job-sharing, you might have to share your computer with a co-worker. Or, if someone else has rights to your folders on the network, you might want to protect sensitive files.

There are two levels of security in WordPerfect: read-only and password-protected. If you specify a file as read-only, someone else can open the file, but he or she can't save it back under the original name. In other words, the person can't save any changes to the file. The drawback to this approach is that a savvy user could edit the properties for a file and remove the read-only attribute.

Follow these steps to specify a file as read-only:

1. In a file management dialog box, select the file.
2. Choose File, Properties or right-click the file and choose Properties. The Properties dialog box for that file appears (see Figure 4.8).
3. Place a check mark next to Read-only in the Attributes section of the Properties dialog box.
4. Click Apply, and then click OK.

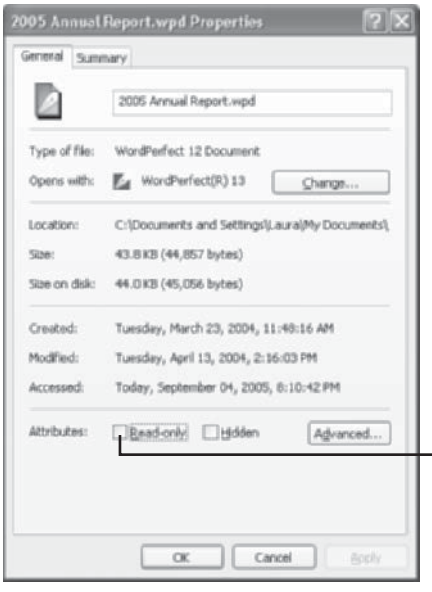


Figure 4.8
After you set the read-only attribute, no one (not even you) can save changes to the original file.

The next time you (or anyone else) try to open this file, you'll get a message reminding you that this file is set to read-only (see Figure 4.9). If you attempt to save the file by clicking the Save button (or by using the File, Save command), the Save As dialog box opens, and you are forced to type a new filename before you can save the file.

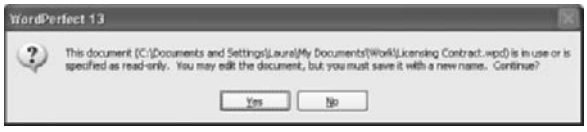


Figure 4.9
WordPerfect reminds you with this message that a file has been set to read-only.

The second level of security is setting a password for a file. The advantage of this approach is that when you save a file with a password, no one can open it unless he or she knows the password. The disadvantage is that if you forget the password, you can't get to the file. At least that's the way it's supposed to work. There are programs that can crack WordPerfect passwords. Admittedly, some people use these programs to get into documents that they shouldn't see, but realistically speaking, these programs are invaluable to system administrators when employees forget their passwords.

1. With the file open in the document window, choose File, Save As to open the Save As dialog box (see Figure 4.10).

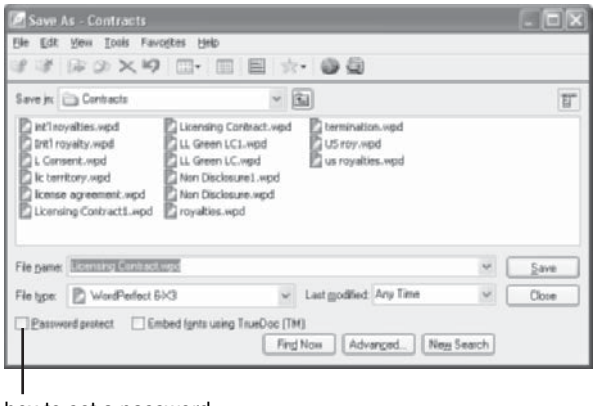


Figure 4.10
After you save a document with a password, you must know the password to open the file from then on.

2. If necessary, type a name for the file in the File Name text box.
3. Place a check mark in the Password Protect check box.
4. Click Save. The Password Protection dialog box opens (see Figure 4.11).
5. Type the password in the Type Password for Document text box.
6. Retype the password in the Retype Password to Confirm text box.
7. Choose the type of password protection you want to use and then click OK.

Figure 4.11
If you'll be sharing this file with someone who has WordPerfect 6.x, make sure you choose Original Password Protection in the Password Protection dialog box.

NOTE

If you opt for Enhanced Password Protection, the password is case-sensitive. In other words, you must type the password in the same case that you used when you assigned it. Original Password Protection is not case-sensitive, so if you think you'll have trouble remembering the case, choose this option instead.

If you change your mind and want to "unprotect" a file, you can simply remove the password protection. The steps to remove password protection from a file are very similar. Follow these steps to remove a password:

1. Open the password protected file as you normally would.
2. Choose File, Save As to display the Save As dialog box (refer back to Figure 4.10).
3. Remove the check mark next to Password Protect.
4. Choose Save.
5. When you see the message saying that file already exists, choose Yes to replace it.

CAUTION

I spent some time online researching programs that can crack WordPerfect passwords. I found several Web sites offering password-cracking programs and services, so consider yourself warned. WordPerfect's passwords are not 100% guaranteed to prevent prying eyes.

SAVING WORDPERFECT FILES

In Chapter 1, "Getting Comfortable with WordPerfect," you read about the basics of saving a file in WordPerfect. You learned where the Save button is on the toolbar (and how to choose File, Save from the menus). You also learned how create an appropriate file name. Now that the elementary concepts have been covered, you are ready to learn how to save WordPerfect files into other formats and how to save a WordPerfect file without metadata.

SAVING WORDPERFECT FILES IN A DIFFERENT FORMAT

WordPerfect products have always shipped with the most comprehensive and powerful file filters that can be written for other products. WordPerfect Office X3 takes file compatibility to a whole new level with feature set additions and enhancements geared to creating better matches to comparable Microsoft Word features. For this reason, many businesses are turning to WordPerfect Office X3 for a more cost-effective office suite, without worrying about compatibility with their clients.

When you save a file to another application's format, you lose the elements that aren't supported in that application. Thankfully, WordPerfect conversion drivers do an excellent job of translating WordPerfect features into comparable features in other applications.

If someone opens your WordPerfect X3 file in a previous version of WordPerfect, document features (in the form of codes) that are not supported in that version won't work, so they are converted to Unknown codes. The codes are preserved so that when you open the document again in WordPerfect X3, everything is still in place.

To save a file in a different format, follow these steps:

1. With the file open in the document window, choose File, Save As. The Save As dialog box appears.
2. Click the File Type drop-down list arrow. A list of available save formats appears (see Figure 4.12).

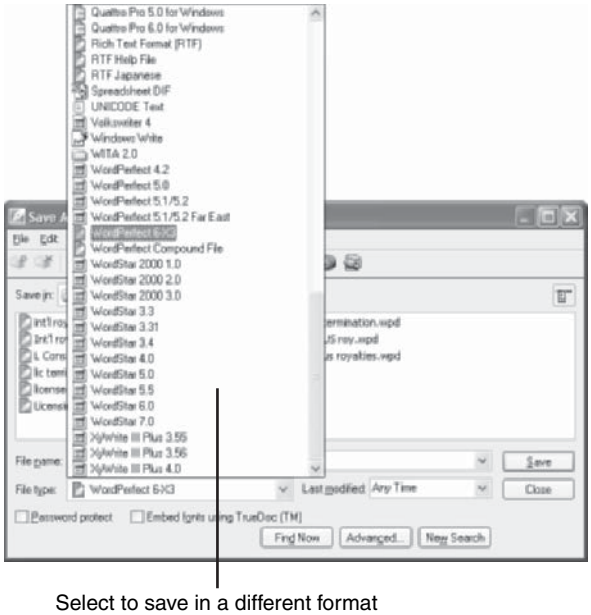


Figure 4.12
When you save a file, you can choose a different file format from the File Type drop-down list.

3. Scroll through the list and choose a format.
4. If necessary, type a name (and location) for the document in the File Name text box and then click Save.

TIP FROM

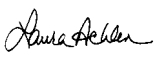
When saving files to another format, it might be helpful to include an abbreviation of the name of that format in the filename so that you don't confuse that file with the one in WordPerfect format. For example, a file in Word 2003 format might be called `jmani trust-w03`.

NOTE

WordPerfect really shines when it comes to importing and exporting files. You can convert files from many different file formats, including word-processor, text, graphics, spreadsheet, and database formats. You can export WordPerfect documents to more than 80 file formats. What does this mean to you? Essentially, it means that it doesn't matter what applications your clients and associates are using—you can open their files in WordPerfect and then save them back to their native format.

For more information, choose Help, Help Topics. Click the Index tab and type **`import`**. Double-click File Formats (under Importing) to open the help topic.

TIP FROM



The file format for WordPerfect documents hasn't changed since version 6.0, so the default save format in WordPerfect X3 is WordPerfect 6-X3. Anyone with WordPerfect version 6 or later can open files created in the more recent versions directly. If you need to send a file to someone with WordPerfect 4.2 or 5.x, choose that format from the File Type list when you save the file.

If you're getting an error message when you try to open a file in a different format, see "Installing the Rest of the Conversion Filters" in the Troubleshooting section at the end of this chapter.

SAVING FILES WITHOUT METADATA

Metadata is invisible information that is attached to every WordPerfect file in the form of undo/redo history, reviewers' notes, document summary information, hidden text, and comments. The undo/redo history may contain information that has been cut, copied or deleted. Reviewers' notes may contain information that you do not want to share. The same goes for hidden text and comments.

WordPerfect X3 introduces a new feature to ensure that you'll never get caught with confidential or sensitive information in your documents. The new Save Without Metadata feature makes it simple to remove all metadata from a document, without the need to purchase or download an additional utility.

To save a WordPerfect document without metadata

1. Choose File, Save Without Metadata to display the Save Without Metadata dialog box (see Figure 4.13).

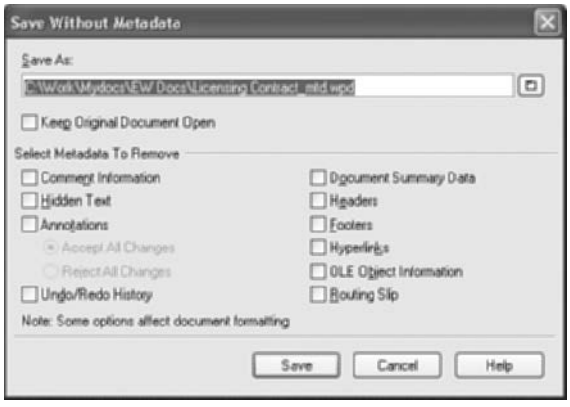


Figure 4.13
When you save a file, you can choose a different file format from the File Type drop-down list.

2. Click the Browse icon to locate the drive and folder where you want to save the document.
3. WordPerfect will automatically add _mtd to the end of the filename to identify that the file does not contain metadata. If necessary, make adjustments to the filename, but leave the _mtd alone.
4. Enable the Keep Original Document Open check box. (If the check box is not enabled, the original document will close, and the metadata-free version will remain open.)
5. In the Select Metadata to Remove section, enable the appropriate check boxes to specify what metadata elements that you want removed from the document.
6. Choose Save.

USING DOCUMENT SUMMARIES

One of the lesser known, but incredibly powerful, file management features is the *document summary*. Some people don't even know it exists, but those of us who depend on full-text search and retrieval techniques can't live without it. Document summary information can be viewed from the file management dialog boxes, so you can learn a lot about a file without opening it first.

Document summaries go hand-in-hand with QuickFinder because you can narrow a search from the entire document to the document summary. This not only speeds up the process, but it also enables you to search for information that isn't included in the document text, such as an author's name, a client's account number, and so on. The last section discusses searching for files with WordPerfect's QuickFinder.

FILLING OUT A DOCUMENT SUMMARY

Before you start thinking that you don't have time to fill out a document summary, think of all the time you'll save later, when you need to locate and organize related files. There's no rush—a document summary can be completed whenever you want, as long as you have the document open.

To fill out or edit a document summary, with the document open, choose File, Properties. The Properties dialog box appears (see Figure 4.14). Some of this information might already be filled in for you, such as the creation date, the author, and the typist. WordPerfect grabs the author/typist name from the User Information section of the Environment Settings (which you get to by choosing Tools, Settings, Environment).

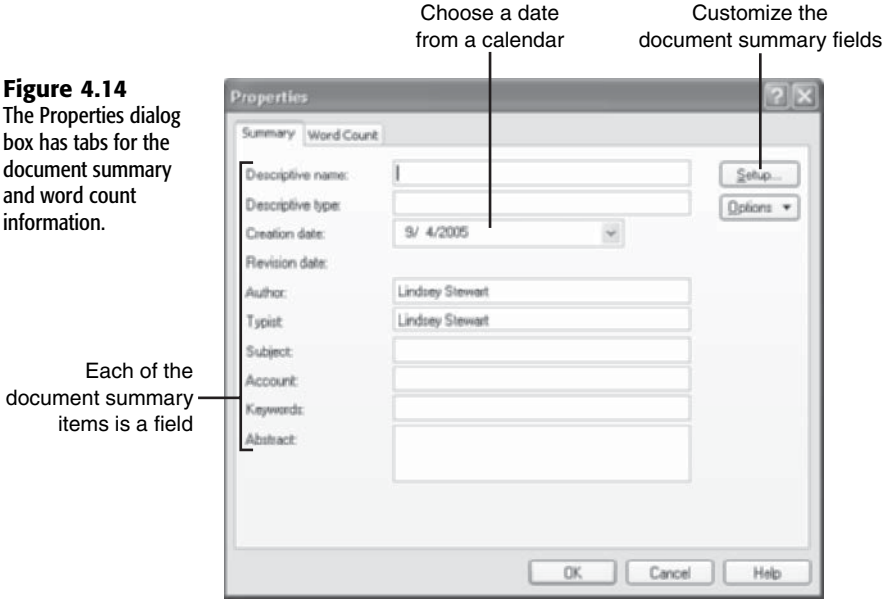


Figure 4.14
The Properties dialog box has tabs for the document summary and word count information.

To enter information in a field, click in the field and type. You can also press Tab to move to the next field or Shift+Tab to move back to the previous field. When you're finished, click OK. Now, save the document so that the summary information you just typed is saved.

CUSTOMIZING DOCUMENT SUMMARY FIELDS

Document summaries can be customized so that they contain only the fields you will use, which speeds up the time it takes to fill it out. Also, users can quickly locate files by narrowing the search to only those fields in the document summary.

To customize document summary fields, choose File, Properties, Setup. The Document Summary Setup dialog box appears (see Figure 4.15). The left side contains a list of all the document summary fields from which you can choose. The right side shows the fields that are currently displayed.

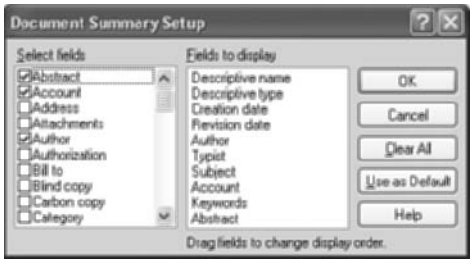


Figure 4.15
You can choose from more than 50 fields to create a document summary that captures the exact information that's relevant to you.

You can customize the document summary by using the following techniques:

- If you want to remove a field from the Fields to Display list, deselect the field in the Select Fields list. Click the check box to remove the check mark.
- If you want to start from scratch, choose Clear All to remove all the fields from the Fields to Display list.
- Click and drag the fields in the Fields to Display list to arrange them in the proper order. For example, you might want to put the most important fields at the top. This way, you're sure to fill in the important fields because you'll see them first.
- If you want to use the new document summary as the default, click Use As Default, and then click Yes to confirm that you want to save the new configuration as the default. Otherwise, your changes are reflected in the document summary for this document only.
- If you change your mind and want to return to the default document summary, choose Cancel to close the Document Summary Setup dialog box without saving your changes.

CUSTOMIZING DOCUMENT SUMMARY SETTINGS

WordPerfect has always differentiated itself from other applications by giving you full rein to customize its features. Buried in a dizzying array of customization options is the capability to customize how you use document summaries. The most important one for me is turning on the prompt that reminds me to fill in the document summary when I save a document for the first time.

Choose Tools, Settings, Summary to open the Document Summary Settings dialog box (see Figure 4.16). From here you can do the following:

- Change the default subject search text that the Extract command uses to fill in the Subject field.
- Type a default descriptive type to be used in the Descriptive Type field for all document summaries.
- Turn on a prompt that reminds you to fill in the document summary when you save (or exit) a new document.
- Convert a descriptive filename to a long filename when you open the document.
- Insert the filename in the Descriptive Name field when you save the document.

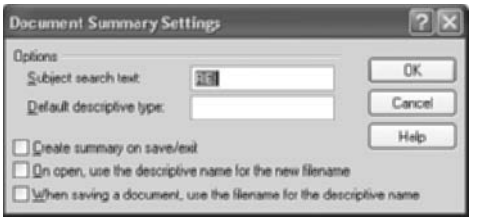


Figure 4.16
You can choose the Create Summary on Save/Exit option if you have trouble remembering to fill in document summaries.

TIP FROM

You don't have to change the default subject search text if you use Re: in your documents instead of RE:. The Extract command finds Re:, re:, and RE:.

FINDING MISSING FILES BY USING QUICKFINDER

Most new computers ship with at least 40 gigabytes of hard disk space. The number of files you can store on a drive of that size is astounding—it's like trying to get your mind around how much a trillion dollars is. Believe me, you don't want to search through every folder on a 40GB drive "by hand" for a file, and that's assuming you can remember the name of the file you're looking for. No, when it comes to finding files, QuickFinder is the tool you want to reach for.

QuickFinder enables you to search for files based on the filename, content, date modified, or type. You can build a search that is as simple as looking for every file that contains the word "recycle." Or, you can create a complex search designed to display a very narrow selection of documents (which is often the case when searching through legal, scientific, and medical documentation).

TIP FROM

You don't have to be in WordPerfect (or any other application) to use QuickFinder. Choose Start, All Programs, WordPerfect Office X3, Utilities, QuickFinder Searcher.

NOTE

Some Productivity Pack and OEM versions, as well as the Home edition, will not include the QuickFinder. Corel pays licensing fees to Novell, Inc. for the QuickFinder technology, so it isn't included in the more economical packages.

PERFORMING A BASIC SEARCH

I call it a "basic search" but actually you can do quite a bit with the options you have available in the file management dialog boxes. (The next section discusses how to use the options in the Advanced Find dialog box.)

If you've used previous versions of WordPerfect, the new interface is a little disconcerting. Rest assured that the functionality is still here—it has just been reorganized a bit. For example, in previous versions of WordPerfect, in the QuickFinder dialog box, there was a text box where you could type in a filename (all or part of it), and a separate text box where you could type text that you wanted to search for. In WordPerfect X3, the functions of these two text boxes have been combined into one: Now you can type filenames and content in the File Name text box of any file management dialog box (see Figure 4.17).

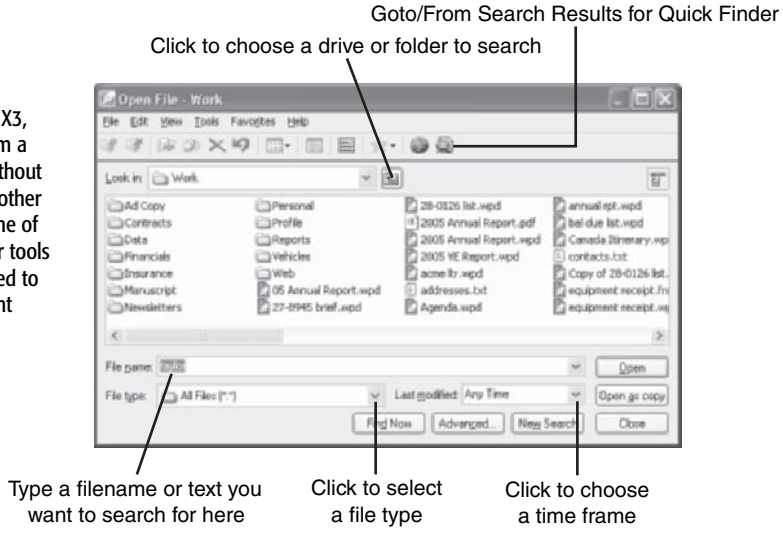


Figure 4.17
In WordPerfect X3, you can perform a basic search without switching to another dialog box. Some of the QuickFinder tools have been added to file management dialog boxes.

The following are the options for creating a basic search for in a file management dialog box:

- Choose the drive or folder that you want to search for in the Look In text box.
- Type all or part of a filename in the File Name text box. If you don't know the entire name, use the asterisk wildcard to replace one or more characters. For example, type **`gateway*`** to locate Gateway Development, Gateway Board, Gateways Center, Gateways PUD, and so on.
- Instead of typing all or part of the filename, you can type the content you want to search for in the File Name text box. This might be a word, part of a phrase, or a combination of both. If you can't remember the exact text, use the asterisk wildcard to replace one or more characters. For example, type **`lymph*`** to locate lymph glands, lymphoma, lymphocyte, lymphatic, lymphangial, and so on.
- Select a file type from the File Type text box. The default is to search every file, so if you know you're looking for a WordPerfect document, choose WP Documents from the list. It almost goes without saying, but this really cuts down on the time it takes to find a file.
- Select a time frame from the Last Modified list box. For example, if you want to locate the documents that you've modified in the past month, choose Last month from the list.

Each of these options can be filled in separately or in combination. When you're finished, click Find Now. When the search is complete, the QuickFinder Search Results folder is displayed with a list of files (and their locations) that match the criteria (see Figure 4.18).

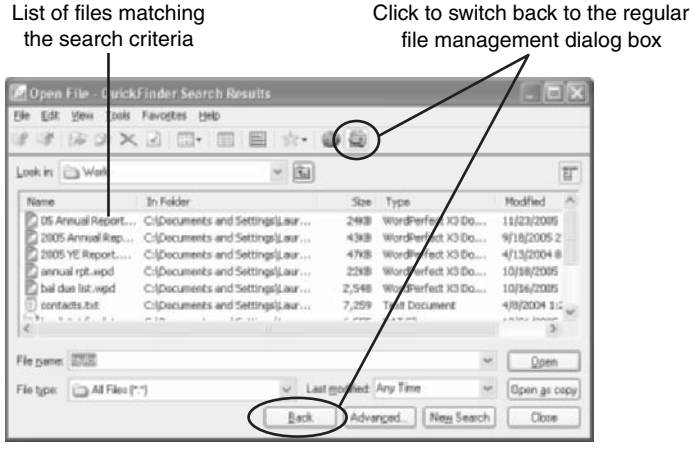


Figure 4.18
When QuickFinder completes a search, the results are placed in the QuickFinder Search Results folder.

If you want to open a file, double-click it. To open a group of files, select them and then click Open. Otherwise, use the same techniques you learned earlier in this chapter to manage the files.

When you're ready to return to the "regular" file management dialog box, click the Go to/from Search Results for Quick Finder button or the Back button. Use the Go to/from Search Results for QuickFinder button to toggle back and forth between the two file lists.

PERFORMING AN ADVANCED SEARCH

If you're ready to take your searches one step further, you're ready for Advanced Find. From the Advanced Find dialog box, you can search through document summary fields (didn't I tell you this would come up again?) and you can refine your content searches by using operators. WordPerfect old-timers, this is where you'll find the options you're used to seeing when you click the QuickFinder tab of a file management dialog box.

After you've entered the criteria you want in the file management box, choose Advanced to open the Advanced Find dialog box (see Figure 4.19). From here, you can build on those criteria by adding operators and limitations on where QuickFinder can search.

The following are ways you can create a more complex search:

- Double-click the filename or content search criteria to edit the existing criteria in the Find Files That Match These Criteria list box.
- Double-click the Insert a New Property item in the Find Files That Match These Criteria list box to create a new search criterion.

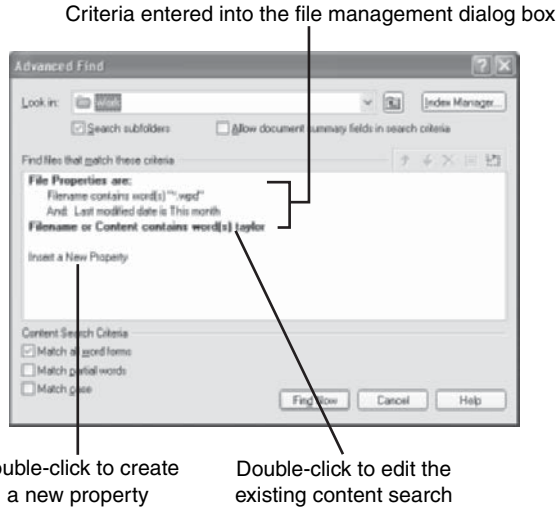


Figure 4.19
In the Advanced Find dialog box, you can search through document summary fields and add operators to your content search.

Follow these steps to create a new search criterion:

1. Choose the And or Or operator from the first drop-down list.
2. Click the second drop-down list arrow and choose where you want QuickFinder to search (such as Content, Filename, Both). The document summary fields will appear if you have selected Allow Document Summary Fields in Search Criteria (see Figure 4.20).

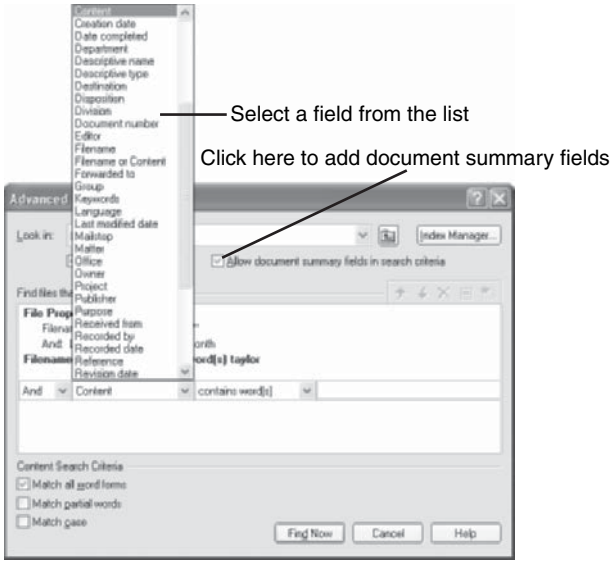


Figure 4.20
Click the second drop-down list arrow to specify a filename or content search. You can also choose from a list of document summary fields if you choose Allow Document Summary Fields in Search Criteria.

3. Click the third drop-down list arrow and select the proximity criteria you want to use for the content search (see Figure 4.21). Note that this list will change depending on the selection you make in the second drop-down list.
4. Type the content in the text box on the far right.

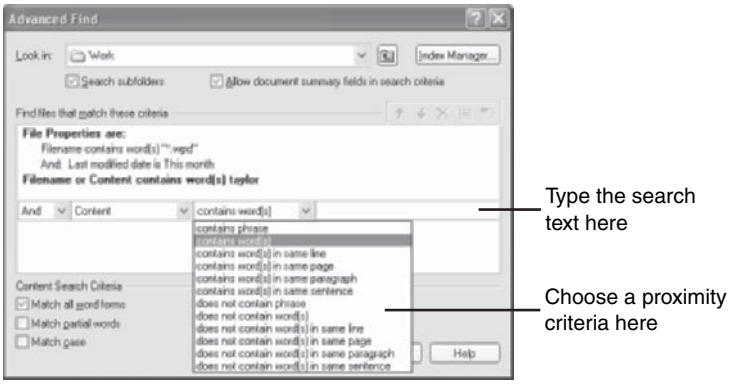
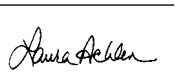


Figure 4.21
Click the third drop-down list arrow to choose the proximity limitation you want to impose on the content search.

In the Content Search Criteria section of the Advanced Find dialog box, you can select from the following options:

- Choose Match All Word Forms if you want QuickFinder to look for all the different forms of a word. For example, if you search for `recycle`, QuickFinder finds the words recycle, recycled, recycles, and recycling.
- Choose Match Partial Words if you want QuickFinder to search for the content text even if it's in the middle of another word. For example, searching for `sulfur` locates the following: sulfuric, sulfurous, sulfuryl, and sulfurate.
- Choose Match Case if you want QuickFinder to look for the content by using the exact case that you've typed in. For example, you might want QuickFinder to locate the word "Water," but only if it's capitalized.

TIP FROM



The Advanced Find options are sticky, which means they stay in effect until you close the File Management dialog box. To clear the Advanced Find options, click New Search in the File Management dialog box.

Are you getting frustrated because you're searching for a file that you know is in a folder and you know it contains the text you're searching for, but QuickFinder won't find it? See "QuickFinder Doesn't Find the File" in the Troubleshooting section at the end of this chapter.

CREATING A FAST SEARCH

There is one more important aspect of QuickFinder that you should know about. It's called the QuickFinder Manager, and you use it to create files that contain a list of every word in a series of documents. Rather than search through the text of every file, QuickFinder searches through the fast search file.

The most obvious advantage is the significant decrease in the amount of time it takes to locate files. A less obvious advantage is that you can combine text from documents in different folders and drives and search it all at once (rather than perform a series of QuickFinder searches on each folder or drive).

You create fast searches in the QuickFinder Manager (see Figure 4.22). You can click Index Manager in the Advanced Find dialog box or you can choose Start, (All) Programs, WordPerfect Office X3 Utilities, QuickFinder Manager.

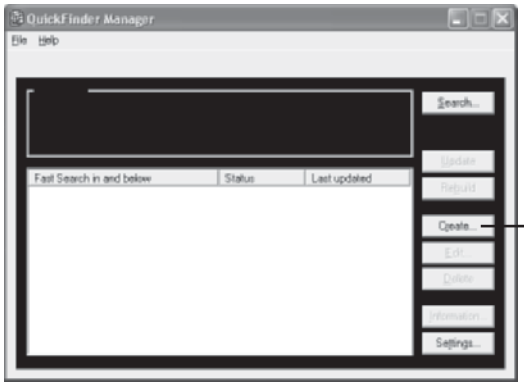


Figure 4.22
In the QuickFinder Manager, you can create two types of fast search files, each geared toward saving you time as you search for information in your files.

CREATING A STANDARD FAST SEARCH

There are two types of fast searches: standard and custom. A *standard fast search* searches through only one folder (and all its subfolders); a *custom fast search* can search through multiple folders (with or without their subfolders). The following steps show you how to create a standard fast search:

1. If necessary, click the Standard Fast Search Setup tab in the QuickFinder Manager dialog box.
2. Click Create. The QuickFinder Standard Fast Search dialog box appears (see Figure 4.23).
3. Type the path for the folder you want to search or click the Browse button to look for the folder.

Figure 4.23
A standard fast search can only search through one folder, so it's pretty straightforward to set up.

4. Select one of the update options:
   - If you choose Manual Update, you have to remember to update the file when you add, remove, or edit files in the folder.
   - If you choose Automatic Update, QuickFinder updates the fast search at the specified interval (provided your computer is on and Windows is running).
5. Click the Options button to open the QuickFinder Fast Search Options dialog box (see Figure 4.24), where you can finish configuring the fast search. The options that you choose here override the settings you make in the QuickFinder Settings dialog box (click the Settings button in the QuickFinder Manager dialog box shown in Figure 4.22).

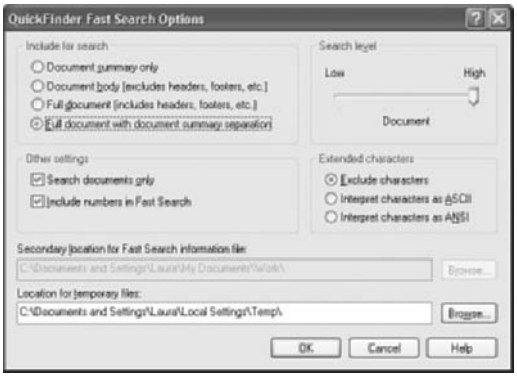


Figure 4.24
You can fine-tune a fast search with options in the QuickFinder Fast Search Options dialog box.

6. Click OK twice to return to the QuickFinder Manager dialog box, where the new fast search appears in the list. When the status is Updated, the fast search file has been created and is ready for use.

TIP FROM

If you don't want to include the subfolders of a folder in a standard fast search, create a custom fast search instead. A custom fast search can be created to search through a folder with or without the subfolders.

NOTE

By default, QuickFinder creates the fast search file, which has the .idx extension, in the folder that you selected for the standard fast search.

CREATING A CUSTOM FAST SEARCH

A custom fast search is more flexible than a standard fast search because you're free to build a list of folders to search in one pass; you don't have to conduct a separate QuickFinder search for each folder. You can select folders from different drives (including network drives), and you can exclude certain subfolders when necessary. Follow these steps to create a custom fast search:

1. Click the Custom Fast Search Setup tab in the QuickFinder Manager dialog box.
2. Click Create. The QuickFinder Custom Fast Search dialog box appears (see Figure 4.25).

Figure 4.25
With a custom fast search, you can build a list of multiple folders to search through. The folders can all reside on the same drive, or they can be scattered across multiple drives.

3. Type a name for the fast search in the Fast Search Name text box.
4. Select one of the update options:
   - If you choose Manual Update, you have to remember to update the file when you add, remove, or edit files in the folder.
   - If you choose Automatic Update, QuickFinder updates the fast search at the specified interval (provided your computer is on and Windows is running).
5. Type a folder name in the Folder to Add text box or click the Browse button to look for the folder.

CAUTION

Unless your system has gobs of memory and tons of free disk space, resist the urge to create a fast search for huge sections of your hard drive. Instead, create fast searches for folders that have a common thread (such as projects, clients, customers, suppliers, and .distributors).

6. Select or deselect the Include Subfolders option to either include or exclude the subfolders for the folder you specified in step 5.
7. Click Add to insert this folder in the Folders to Search list box.

TIP FROM

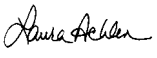
If you accidentally add the wrong folder to the list, or if you forget to select/deselect the Include Subfolders option, you can remove a folder from the list. Select the folder, and then click the Remove Folder button.

8. Repeat steps 5–7 to include all the folders that you want in the fast search.
9. Choose Options to open the QuickFinder Fast Search Options dialog box (refer back to Figure 4.24), where you can finish configuring the fast search. The options you choose here override the settings you make in the QuickFinder Settings dialog box (click the Settings button in the QuickFinder dialog box shown in Figure 4.24).
10. Click OK twice to return to the QuickFinder Manager dialog box, where the new fast search appears in the list. When the status reads Updated, the fast search file has been created and is ready for .use. The fast search file for a custom fast search is created in \Program Files\WordPerfect Office X3\Programs.

CAUTION

Take care not to accidentally delete a fast search information file (with the .idx extension). The name of the file is cryptic and can easily be mistaken for a misplaced temporary file.

TIP FROM



On some networks, it's up to the network administrator to create fast search files for the network drives. These can be distributed across the network and imported into the individual user's custom fast search list. In a file management dialog box, right-click the .idx file and choose Add to Custom Search List. Use the same steps if a co-worker has created a large fast search file and you want to use it. Occasionally, when you import an .idx file, it comes in without a name. You can still see it in the list, with Imported in the Status column. Select it and choose Edit to type a fast search name.

SELECTING A FAST SEARCH IN QUICKFINDER

Now that you've got a nice, neat list of fast search files, you're probably wondering how to tell QuickFinder *which* fast search to use. The answer is: by selecting them from a custom indexes list in the Advanced Find dialog box.

The first step is to add your fast searches to the list. To do this, you have to locate the search file so that you can select it and add it to the list. You can do this in one of two ways: You can look in the Properties dialog box for each fast search, or you can search for all the fast search files at once.

To look at the properties for a fast search, select it in the QuickFinder Manager dialog box (refer to Figure 4.22), and then click Information. The QuickFinder Fast Search Information dialog box appears (see Figure 4.26). The path for the index file is shown in the dialog box. Jot this down—this is where you need to go to find the file. Switch back to the Open File dialog box and navigate to that folder. The index filename starts with `~QF`. Right-click the file, and then choose Add to Custom Search List.

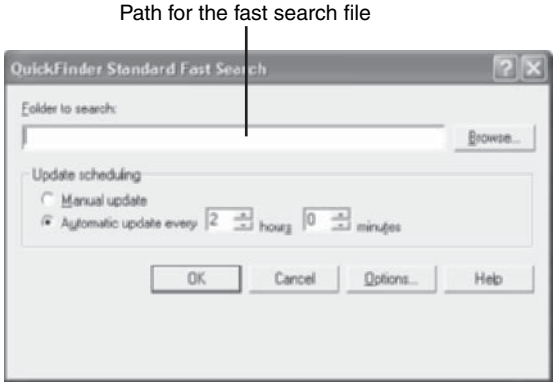


Figure 4.26
The path for the fast search file is shown in the QuickFinder Fast Search Information dialog box.

You can also search for all the index files at once and then selectively add them to the Custom Indexes list. In the Open File dialog box, select a drive from the Look In drop-down list. Type **`~QF`** in the File Name text box, and then choose Find Now. When the search results appear, right-click the files you want to add and choose Add to Custom Search List.

Now you have the files in the list. To select a fast search, click the Look In drop-down list arrow in the Advanced Find dialog box. Scroll up to the top of the list. You should see Custom Indexes at the very top. Click the plus sign to open the list (see Figure 4.27). Select the fast search that you want to use, and then fill out the rest of the search .criteria.

NOTE

> You won't be able to choose a QuickFinder fast search from the Look In drop-down list in the Open File dialog box (or any other file management dialog box, for that matter). You must be in the Advanced Find dialog box to get to that option.

Does QuickFinder find some, but not all, the files you are searching for? See "QuickFinder Doesn't Find All the Files" in the Troubleshooting section that follows.

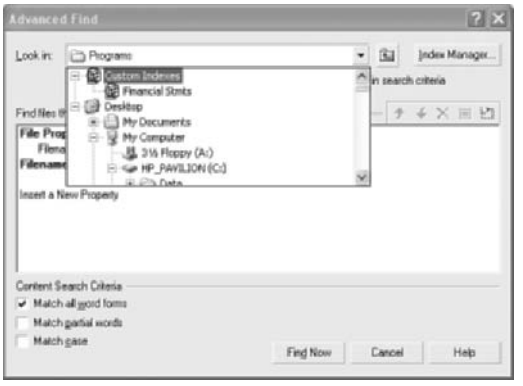


Figure 4.27
You can choose a fast search in the Look In drop-down list of the Advanced Find dialog box.

TROUBLESHOOTING

CAN'T SELECT MULTIPLE FILES

I can't seem to select more than one file from my file list. When I try to select the second file, the first is deselected.

Selecting multiple files can be tricky. You have to remember to hold down the Ctrl key when you select the second and subsequent files. If the files are one after the other, you can select them all at once: Click the first one, hold down the Shift key, and then click the last one.

MISPLACED FILES

I just moved (or copied) a file to another folder, but now I can't find it.

Maybe you are looking for the wrong filename. Or, you could be looking in the wrong folder. Either way, the fastest way to find the file is to use QuickFinder to search for it. You can either search for the filename, or if you are unsure about the filename, you can search for text in the file. See the section "Finding Missing Files by Using QuickFinder" in this chapter for more information.

CAN'T CLICK TWICE TO RENAME

I'm trying to click twice to rename a file, but I can't get the editing box to appear.

This method for renaming files and folders is faster than choosing Rename from a menu, but it's a little trickier. You have to be sure to click the name, not the icon. If you click the icon, WordPerfect selects the file, not just the name. Also, make sure you pause a moment between the first and second clicks.

MY SHORTCUT STOPPED WORKING

I can't get one of the shortcuts in the Favorites folder to work. When I double-click the shortcut icon, nothing happens.

If the file (or folder) has been deleted, moved, or renamed, the shortcut won't be able to find it. Try to locate the file (or folder) by browsing through the other folders on your system, or try to find the file by searching for a piece of text in the file (with QuickFinder). When you find the file, delete the old shortcut, and then create a new shortcut for the file.

INSTALLING THE REST OF THE CONVERSION FILTERS

I'm trying to open a file that was saved in an early release of Word for Windows and I'm getting an error message. A colleague mentioned that I might not have all the conversion filters installed. Where do I find the rest of the conversion files?

To install the additional conversion files, insert the WordPerfect Office X3 CD to start the Setup program. For WordPerfect X3, choose WordPerfect Office X3, and then select Change Which Program Features Are Installed. Choose Next.

Click the plus sign (+) next to WordPerfect Office X3 to open the list of different components. Click the plus sign (+) next to Filters to open the list of different conversion files. Click the drop-down list button next to the category you are interested in and choose This Feature Will Be Installed on Local Hard Drive. Or, click the drop-down list arrow next to Filters and choose This Feature, And All Subfeatures, Will Be Installed on Local Hard Drive to install all of the conversion filters at once. Choose Next, and then Install. Click Finish to close the installation wizard. The new filters have been installed, and they are ready for use.

QUICKFINDER DOESN'T FIND THE FILE

I'm trying to search for a file by using text that is in the file. QuickFinder doesn't find the file. I know it is in the folder somewhere. What am I doing wrong?

First, make sure you're searching the correct drive or folder. Second, try using the Match All Word Forms option to search for alternative forms of a word or the Match Partial Words option to find the word even if it's embedded inside another word. Third, broaden the search by removing some of the criteria. Remember that if one single criterion doesn't match, QuickFinder won't find the file.

QUICKFINDER DOESN'T FIND ALL THE FILES

I'm searching for all the files that contain "watershed ordinance." QuickFinder finds some of the files, but not all of them. Am I doing something wrong?

Probably not. This type of error sometimes happens when you're running QuickFinder on a network drive. It could also be a corrupt index (.idx) file on the hard drive.

First, try rebuilding the files. Delete all the .idx files from your hard drive. Make sure you search all the drives where you might have created fast searches. Remember that by default, a standard fast search creates the file in the folder you specified for that fast search.

Open QuickFinder to search for all the fast search files on your system (type **~QF** in the File Name text box). Select all the files, and then press Delete. Don't worry—this doesn't delete the fast search information! Now, open QuickFinder Manager and rebuild all the fast search files (both standard and custom) by selecting them and clicking the Rebuild button. If you accidentally try to *update* the fast search, you'll get an error because the index file for that fast search doesn't exist.

CHAPTER 5

Using the Writing Tools

In this chapter

by Laura Acklen

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SPELL CHECKING A DOCUMENT

Who would have thought something as simple as a few misspelled words could undermine all your hard work? Save yourself (or your boss) the potential embarrassment by running Spell Checker on every document, no matter how short, before you send it off.

In Chapter 1, "Getting Comfortable with WordPerfect," you learned how to use the Spell-As-You-Go feature to catch misspelled words (and other potential errors) as you type. If you've turned off Spell-As-You-Go, or if you want to check through the entire document all at once, you can run the Spell Checker from the Tools menu.

➔ To learn more about using Spell-As-You-Go and Grammar-As-You-Go, **see** "Understanding WordPerfect's Automatic Proofreading Features," **p. 22**.

TIP FROM

Call me paranoid, but I've gotten in the habit of saving my documents before starting any of the writing tools. This way, if I make some changes that I decide I don't want to keep, I can always revert to my saved copy. Also, in rare cases, the writing tools can cause your system to freeze, so you'll want to be able to get back to your saved document after you restart.

Here's how to start Spell Checker and correct mistakes in your document:

1. Choose Tools, Spell Checker or click the Spell Checker button. The writing tools dialog box with tabs for Spell Checker, Grammatik, Thesaurus, and Dictionary appears (see Figure 5.1). Spell Checker immediately begins checking the document for misspelled words, duplicate words, and irregular capitalization. A potential error is highlighted, and suggested replacement word(s) appear in the Replacements list box.
2. Choose from the following options to correct the misspelled word, add the word to the dictionary, or skip the word:
   - To correct a misspelled word manually, click in the document window, correct the problem, and then choose Resume to continue spell checking.
   - To replace a misspelled word with the correctly spelled word, select the correctly spelled word in the Replacements list box, and then choose Replace. In the case of duplicate words and irregular capitalization, you can select the single word, or the word with correct capitalization, in the Replacements list box (before choosing Replace).
   - If this is a frequently misspelled word, select the correct spelling in the Replacements list box, and then choose Auto Replace to add the combination to the QuickCorrect list. (See "Adding and Removing QuickCorrect Entries" later in this chapter for more information.)
   - If the correct spelling doesn't appear in the Replacements list, edit the word manually in the Replace With box, and then choose Replace.
   - To skip the word here but have Spell Checker stop if it finds it again, click Skip Once.

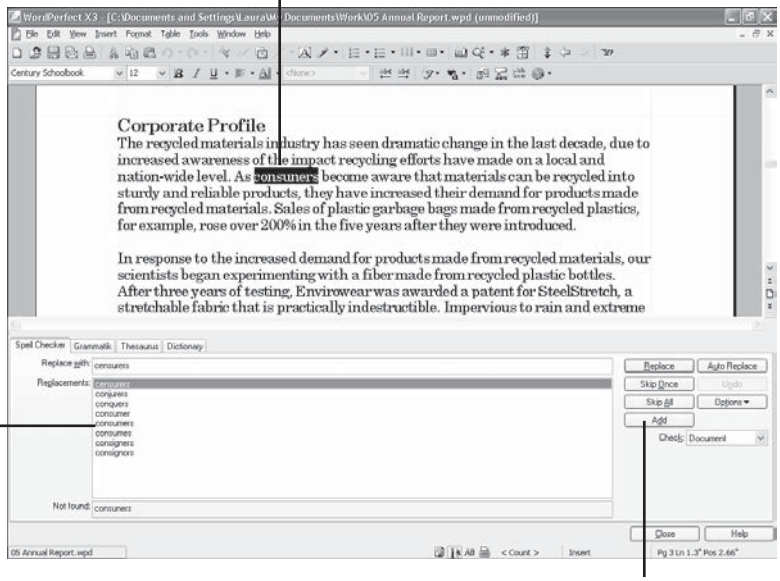


Figure 5.1
Spell Checker, Grammatik, Thesaurus, and Dictionary are all integrated into the same dialog box. Click the appropriate tab to switch to another writing tool.

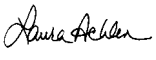
- To skip the word here and for the rest of the document, click Skip All.
- To add this word to the active user word list, click Add.
- If you accidentally replace the misspelled word with the wrong replacement word, click Undo.

By default, Spell Checker checks the entire document. If you don't want to check the whole document, you can select just a portion. To specify which portion of the document you want checked, click the Check drop-down list arrow and select an option.

CAUTION

If you accidentally add a misspelled word to the user word list, see the section "Editing User Word Lists" later in this chapter for information on removing entries.

TIP FROM



The Spell Checker/Grammatik/Thesaurus/Dictionary combo dialog box is a strange beast. It is an integrated dialog box that's anchored to the bottom half of the screen. It doesn't have to stay that way, though, because you can click and drag it wherever you want. Point to the gray area next to the Dictionary tab. The pointer changes to a four-headed arrow. Click and drag the dialog box up into the document window. But be careful—don't go too far, or you'll anchor it to the top half of the screen. Whenever you see the gray

continues

rectangular outline, you can drop it. Now it looks like the other dialog boxes—it has a blue title bar and a Close button. To put it back, point to the title bar and wait for the four-headed arrow, and then drag the dialog box down to the bottom of the screen. When you get close to the bottom, the rectangular guideline changes to one that stretches horizontally across the screen. When you see the horizontal guideline, release the mouse button to anchor it at the bottom of the screen.

If you are tired of skipping over your name, company name, company address, and so forth, see "My Name Is Not Misspelled" in the Troubleshooting section at the end of this chapter.

If you are frustrated because after adding a bunch of words in Spell Checker, it still stops on those words in another document, see "My Words Aren't Being Added" in the Troubleshooting section at the end of this chapter.

NOTE

Choosing Skip All adds the word to the document word list, which is saved with the document and doesn't affect other documents. The strength of this feature becomes clear when you work with long documents that are full of technical terminology. It takes only a few mouse clicks, and after you've built the list, Spell Checker runs a lot faster because it isn't stopping on those terms anymore.

CUSTOMIZING SPELL CHECKER

By default, Spell Checker starts checking the document immediately and looks for misspellings, duplicate words, and irregular capitalization. Phonetically spelled words are included in the Replacements text box to give you more suggested replacement words from which to choose. You can alter these default settings by selectively turning on and off the options that you want to use.

In the Spell Checker dialog box, choose Options to open the pop-up list of options. A check mark next to an option means that it's already turned on. The settings you make on the Options list are "sticky." In other words, they stay in place until you change them again.

EDITING USER WORD LISTS

As the capabilities of the Spell Checker program grew, the dictionary files of earlier versions outgrew the term *dictionary* and became *word lists*. Every new document is created with a document word list and the default user word list. You can add entries to the word lists whenever Spell Checker stops on a word. Choosing Add adds the word to the user word list; choosing Skip All adds the word to the document word list.

If you accidentally add a misspelled word to a word list, you have to edit the list to remove the entry (otherwise, Spell Checker thinks that misspelled word is okay). You can edit document word lists and user word lists to add or remove entries.

In the Spell Checker dialog box, choose Options, User Word Lists. The User Word Lists dialog box appears (see Figure 5.2). Select the word list that you want to edit. From here you can do the following:

- If you want to remove an entry, select it in the list box and choose Delete Entry.
- If you want to add an entry, type the word or phrase you want to add in the Word/Phrase text box, and then choose Add Entry.
- If you want to add an entry with a replacement word, type the word or phrase in the Word/Phrase text box, type the replacement word or phrase in the Replace With text box, and then click Add Entry.
- To add multiple replacement words (which will be displayed in the Replacements list box as suggested replacement words), type the word or phrase in the Word/Phrase text box, type the replacement word or phrase in the Replace With text box, and then choose Add Entry. Type that same word or phrase in the Word/Phrase text box, type another replacement word or phrase in the Replace With text box, and then click Add Entry. Repeat for all the replacement words that you want associated with this word or phrase.
- If you want to edit an entry, select the entry in the list box. Edit the word or phrase in the Replace With text box and then click Replace Entry.

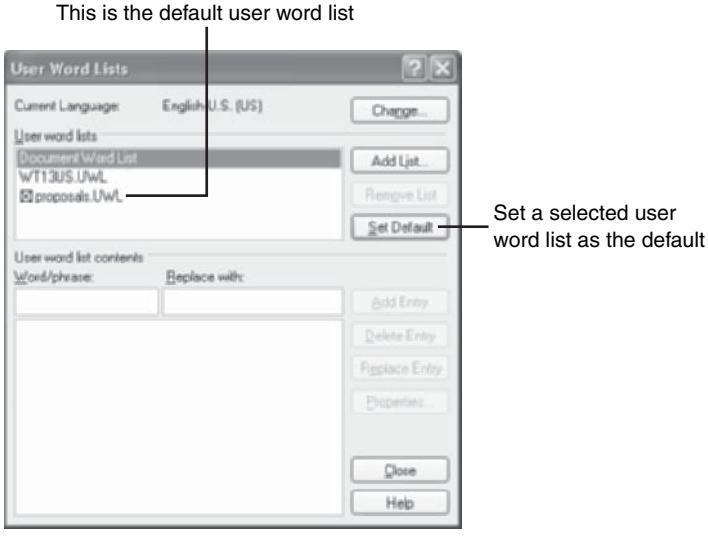
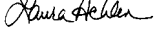


Figure 5.2
In the User Word Lists dialog box, you can select additional user word lists to use. You can also edit the word lists to add, remove, and replace entries.

TIP FROM



You can create more user word lists for specific types of documents. The active, or currently selected, word list is the one that Spell Checker adds words to when you choose Add. To create a new user word list, choose Options, User Word Lists, Add List. Type a name for the file, and then choose Open. The new user word list appears in the list, with an X in the box, indicating that it's active for this document. Choose Set Default if you want this user word list to be active in new documents.

CAUTION

If the word list you want to edit doesn't appear in the list, click Add List to browse for .uwl files. When you find the one you need, select it, and then choose Open.

If you just realized that you've added a bunch of incorrect entries in the user word list file, see "I Trashed the User Word List" in the Troubleshooting section at the end of this chapter.

USING OTHER DICTIONARIES

When you spell check a document, Spell Checker scans two types of word lists: the user word lists and the main word lists. It scans the user word lists first, and if it doesn't find the word, it scans the main word list. If it still doesn't find the word, Spell Checker stops checking the document and flags the word as a possible error.

That's the macro view. The micro view is that you can link up to 10 user word list files and up to 10 main word list files to check your documents. I know, I know, it sounds like overkill—but I've been known to link a few main word lists when I wanted to use several language word list files together. (Each language comes with its own main word list file.) This is how you add specialized third-party dictionaries, such as medical and legal dictionaries, so they can be integrated into Spell Checker.

To add main word lists, choose Options, Main Word Lists, Add List. The name of the default Main Word List file is wt13xx.mor, where xx is the language code. Select the additional word list file you want to add to this word list and then select Open.

TIP FROM

If you don't see the language file that you need, run the WordPerfect Office X3 Setup program and install additional language modules.

To add user word lists, choose Options, User Word Lists, Add List. Type a filename for the new list or browse the system to select another word list, and then click Open. After you've created a list of user word lists, you can select and deselect them to make them active or inactive as needed (see Figure 5.3).

TIP FROM

If you've been using an earlier release of WordPerfect, you can use the supplementary dictionary files or user word files that you created. In the Spell Checker (or Grammatik), choose Options, User Word Lists, Add List. Open `wt12xx.uwl` for version 12, `wt11xx.uwl` for version 11, `wt10xx.uwl` for version 10, `wt90xx.uwl` for version 9, `wt80xx.uwl` for version 8, `wt61xx.uwl` for version 7, or `wtspelus.sup` for version 6.1.

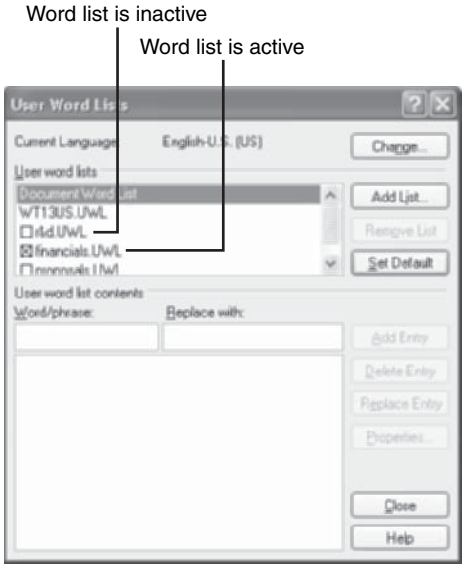


Figure 5.3
You can use up to 10 user word lists together to check your documents, including the default user word list (`WT13US.UWL`).

RUNNING THE SPELL UTILITY

WordPerfect Office X3 includes a Spell Utility program that you can use to convert word lists and dictionaries from previous versions of WordPerfect. You can also view the contents of a main word list, add and remove words, merge a word list with another word list, and create new main word lists. Start the Spell Utility from the Start menu: Choose Start, (All) Programs, WordPerfect Office X3, Utilities, and then click the Spell Utility item. The Spell Utility dialog box appears (see Figure 5.4).

Figure 5.4
Spell Utility is a separate program that you run outside of WordPerfect.

Using the Spell Utility, you can

- **Add words to a main word list**—Click the Add Words tab, and then click the Browse button to select the main word list file (`\program files\common files\corel\shared\writing tools\13\wt13en.mor` is the default main word list file). Choose Open to open the file and activate the rest of the dialog box. Type the word you want to add in the New Word text box, and press Enter. Continue adding words until you've built your list. Choose Save to add the words in the Added Words list.
- **Convert dictionaries and word lists**—Click the Convert tab. Click the Conversion Type drop-down list arrow and choose an item from the list. Choose Browse to select the source file. Specify a name for the word list you are creating in the Destination File Name text box. Choose Convert.

TIP FROM

If you don't see the item you need on the Conversion Type drop-down list, you might have to do a two-step conversion. Try converting the file to a WordPerfect X3 document, and then convert the WordPerfect X3 document to a WordPerfect X3 dictionary.

- **Create a new main word list**—Create a list of words in a WordPerfect document or an ASCII text file. In Spell Utility, click the Convert tab. Select the appropriate conversion type, and then browse for the source file. Type a name for the file you are creating in the Destination File Name text box (make sure you use a .mor extension). Choose Convert.
- **Delete words that you've added to a main word list**—Click the Delete Words tab. Choose Browse to select the main word list file (`\program files\common files\corel\shared\writing tools\13\wt13en.mor` is the default main word list file), and then choose Open. A list of words that you've added appears in the User Words list box. Select a word, and then choose Delete. Choose Save when you're done.
- **Merge two main word lists into one list**—Click the Merge tab. Click the Merge Type drop-down list arrow and choose an item from the list. Browse for the source file. Specify a name for the file (or select a target file) that you want to contain both lists in the Target File Name text box. Choose Add Words in Source to Target, and then choose Merge. If you decide later that you want to remove the merged words, follow these same steps, except choose Delete Words in Source from Target.
- **View words in a main word list**—Click the View tab. Click the Browse button to select a main word list file (`\program files\common files\corel\shared\writing tools\13\wt13en.mor` is the default main word list file). Choose Open to open the file and activate the rest of the dialog box. Type the word (or a partial word) that you want to look up in the Word text box. The search results appear in the Results list box. For a more complete list, choose Look Up.

CHECKING THE GRAMMAR IN A DOCUMENT

Grammatik is a built-in grammar checker that proofs your documents for correct grammar, style, punctuation, and word usage, and thus catches many of the errors that pass by Spell Checker. Interestingly, Spell Checker is integrated into Grammatik, so you only need to run Grammatik in order to run both.

Grammatik follows a strict set of grammatical rules when checking a document for problems. Many good writers, however, often bend these rules to make a point. Don't feel compelled to fix every problem or accept every solution if it changes the meaning of your words. Follow these steps to run Grammatik:

1. Select Tools, Grammatik. If you already have the writing tools dialog box open, click the Grammatik tab. Grammatik immediately starts checking the document and, like Spell Checker, stops and highlights any potential error (see Figure 5.5).

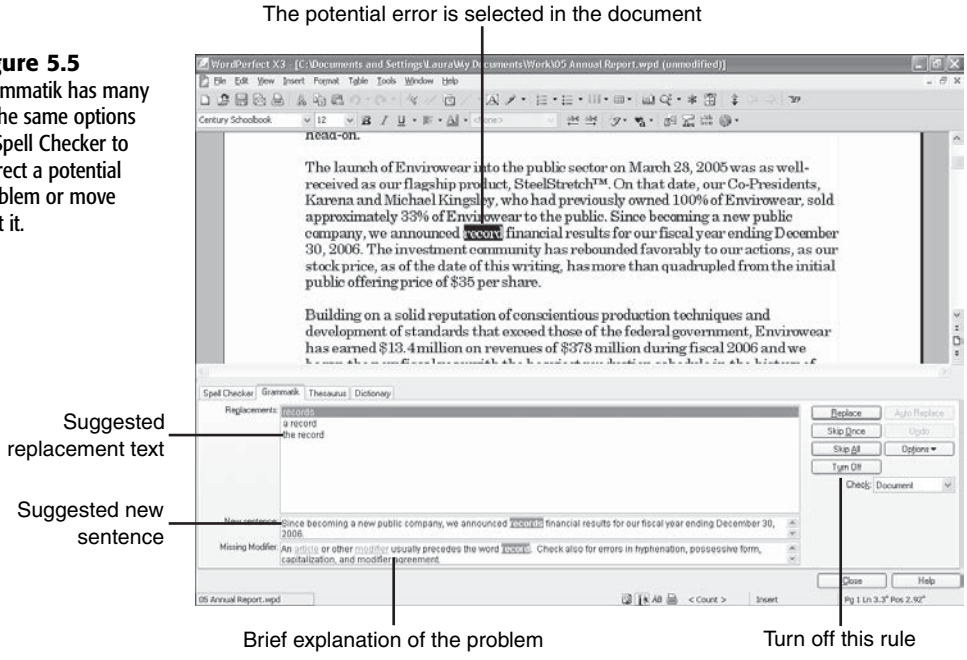


Figure 5.5 Grammatik has many of the same options as Spell Checker to correct a potential problem or move past it.

2. Choose from the following options to correct the error, skip the error, or turn off the rule:
   - To correct a writing error manually, click in the document window, correct the problem, and then click Resume to continue the grammar check.
   - To replace a writing error, select one of the suggestions in the Replacements list box, and then click Replace. If no suggestions are listed, you have to manually correct the text.

- To skip the writing error here but have Grammatik stop if it finds the error again, click Skip Once.
- To skip the writing error here and for the rest of the document, click Skip All.
- The rules by which Grammatik checks your document are organized into *rule classes*. To disable a particular rule class, choose Turn Off. This change is temporary; it affects only the current Grammatik session.
- If you correct a problem, and then change your mind, choose Undo to reverse the last action taken by Grammatik.

By default, Grammatik checks the entire document. If you want to check only a portion of the document, click the Check drop-down list arrow and select an option.

If you want Grammatik to stop flagging a certain error, see "My Sentences Are Not Too Long" in the Troubleshooting section at the end of this chapter.

SELECTING A DIFFERENT CHECKING STYLE

Different types of documents must conform to particular grammatical rules and require varying levels of formality. To accommodate these differences, Grammatik offers 11 predefined checking styles, and you can create your own. By default, Grammatik uses the Quick Check style to check your documents. You can select another style, change the threshold settings, and choose a formality level. In the Grammatik dialog box, choose Options, Checking Styles to display the Checking Styles dialog box (see Figure 5.6).

Figure 5.6
You can select a checking style to match the type of document you are checking.

To choose a checking style, select it in the list, and then click Select. A checking style remains in effect until you choose another one.

To edit a checking style, select it in the list, and then click Edit. The Edit Checking Styles dialog box appears (see Figure 5.7).

If you're having trouble getting your changes to a checking style to stick, see "My Edits to a Checking Style Aren't Getting Saved" in the Troubleshooting section at the end of this chapter.

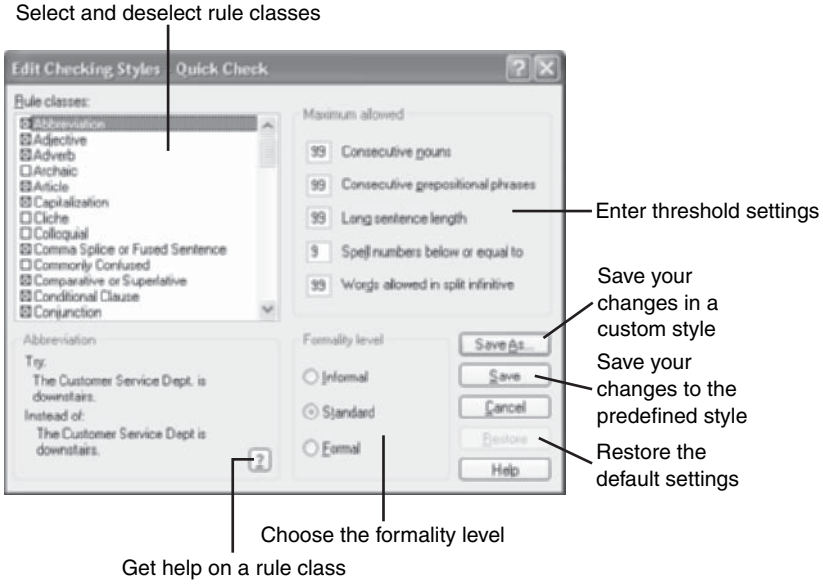


Figure 5.7
You can modify any of the predefined checking styles to enable or disable rule classes, modify the threshold settings, or choose a different formality level.

CUSTOMIZING GRAMMATIK

By default, when you run Grammatik, it starts checking the document immediately, prompts you before an automatic replacement, and suggests spelling replacement words. You can alter these default settings by selectively turning on and off the options that you want to use.

In the Grammatik dialog box, click the Options button to open the pop-up list of options. A check mark next to an option means that it's already turned on. The settings you make on the Options list are "sticky." In other words, they stay in place until you change them again.

GENERATING READABILITY REPORTS

Grammatik can compile three different statistical reports on your document: a readability report, basic counts, and a flagged list. You can also display a parse tree and a parts of speech diagram. To generate these reports, choose Options, Analysis. Choose from the following options:

- **Parse Tree**—This diagram identifies the clauses in the sentence where the insertion point lies.
- **Parts of Speech**—This diagram identifies each word as a noun, a pronoun, an adjective, a verb, an adverb, or another part of speech. This diagram dissects the sentence where the insertion point lies.
- **Basic Counts**—This is a count of words, sentences, and paragraphs, along with the average number of syllables per word, words per sentence, and sentences per paragraph (see Figure 5.8).

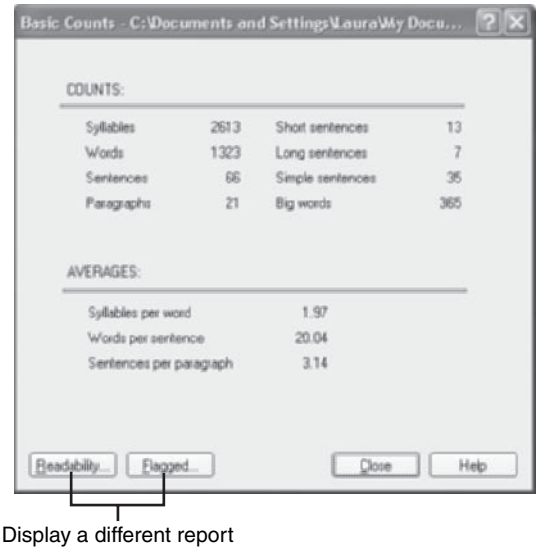


Figure 5.8
The Basic Counts report is similar to the Information sheet in the Properties dialog box, but it is more precise.

- **Flagged**—This report displays a list of errors and the number of times they were flagged during this session.
- **Readability**—This report compares your document to one of three comparison documents (or a document of your choosing) to give you an idea of the skill required to comprehend the document content.

TIP FROM

There is a feature that will prompt you with suggestions as you type—it's called Prompt-As-You-Go. You can use Prompt-As-You-Go to replace misspelled words, grammatical errors, and synonyms. There is a Prompt-As-You-Go text box on the property bar that display suggestions in different colors, depending on what the problem is. If the text is red, a word might be misspelled; if the text is blue, there might be a grammatical error; if the text is black, you can choose a synonym to replace a word. If no words appear in the Prompt-As-You-Go box, the feature may have been turned off. To turn it back on, choose Tools, Proofread, Prompt-As-You-Go.

USING WORDPERFECT'S THESAURUS

A thesaurus helps you find the right words to express your thoughts. Some thoughts and ideas are more complex than others, and most ideas can be expressed in a number of ways. Using the right words enables you to convey exactly the message you want to get across to the reader.

LOOKING UP WORDS IN THE THESAURUS

WordPerfect's Thesaurus looks up synonyms (that is, words with similar meanings), antonyms, and related words. You can start the Thesaurus from a blank screen, but if you click on a word first, the Thesaurus looks up that word.

Choose Tools, Thesaurus, press Alt+F1, or, if you already have the writing tools dialog box open, click the Thesaurus tab. The Thesaurus looks up the word and, by default, displays a list of synonyms, and if available, a list of antonyms and related words (see Figure 5.9).

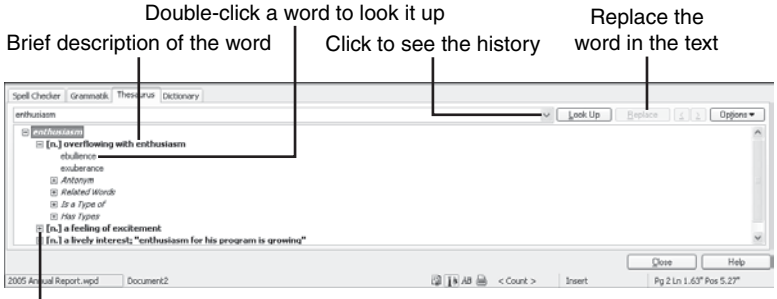


Figure 5.9
The Thesaurus helps you refine your writing by showing you different words to use.

If the insertion point is within a word, the Thesaurus looks up synonyms for that word and displays them in the window. Otherwise, you need to type the word you want to look up in the text box and then click Look Up.

To view the list of words within a category, double-click the category, or click the plus sign in the box. You can also use the left and right arrows on your keyboard to open and close categories.

If you double-click a word in the list, a new window opens for that word. Double-clicking a word in the second window causes a third window for that word to open. When you fill more than three windows, new windows are created (to the right). You can click the scroll arrows to move one window to the left or right.

To look up a word in one of the windows, double-click it. To replace the word in the document with the word from the Thesaurus, select the word, and then choose Replace. If you change your mind, click Edit, Undo in the document window to reverse the change.

There is a history list so you can quickly get back to a word that you noticed earlier. Click the drop-down list arrow next to the Look Up button to select from a list of words.

CUSTOMIZING THE THESAURUS

As with the other writing tools, the Thesaurus is set up to start looking up words immediately, and to compile a list of synonyms and additional categories. You can turn off Auto Look Up and choose the types of words the Thesaurus looks up. In the Thesaurus dialog box, click the Options button to open the pop-up list of options.

TIP FROM

Laura Acklen

Not every lookup option is supported in every language. There is a table in Help that tells you which Thesaurus options each language supports. Choose Help, Help Topics, and then click the Contents tab. Double-click Using Writing Tools, double-click Customizing Look Up Options, double-click Customizing Look Up Options (again), and then click Languages and Support Look Up Options. You can print this out if you want to make it easier to read. In the Help window, choose File, Print Topic.

USING THE DICTIONARY

WordPerfect X3 includes a built-in version of the *Pocket Oxford Dictionary*, so you have definitions for more than 30,000 words at your fingertips. The Dictionary can be used to look up the definition of a selected word in your document, or you can type the word in yourself. You can perform basic searches for a specific word, or using operators, you can perform advanced searches that include and exclude words from the search.

Follow these steps to launch the Dictionary:

1. If you want to look up the definition for a word in your document, select it first.
2. Select Tools, Dictionary or press Ctrl+Alt+F1. Or, if you already have the writing tools dialog box open, click the Dictionary tab to display the Dictionary dialog box (see Figure 5.10).

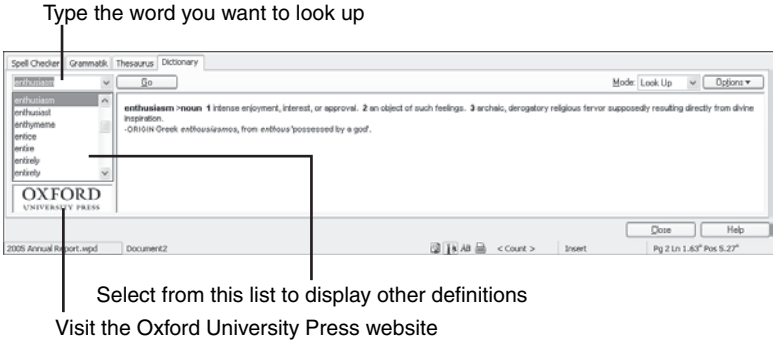


Figure 5.10
The built-in Pocket Oxford Dictionary contains definitions for more than 30,000 words.

NOTE

The built-in *Pocket Oxford Dictionary* can be upgraded to the *Oxford Concise Dictionary*, which contains 70,000 definitions. There is an item on the Options menu that takes you to a Corel Web page where you can download the upgrade for a nominal charge.

SEARCHING THE DICTIONARY

With a printed dictionary, you have to know what you're looking for. In other words, you must have *some* idea of how to spell the word, or you won't find it. The beauty of an

electronic dictionary is that you can locate words by searching through the definitions for a particular word or phrase. For example, you can locate all the terms that have the word *tree* in the definition. Furthermore, if you know how to spell only part of a word, you have a much greater chance of locating it with an electronic search.

Here's how to search through the dictionary:

1. With the Dictionary dialog box displayed, open the Mode drop-down list and choose Search.
2. Type the word that you want to search for in the text box (underneath the writing tools tabs).
3. Choose Go. A list of terms that contain the search word in the definition is shown (see Figure 5.11).

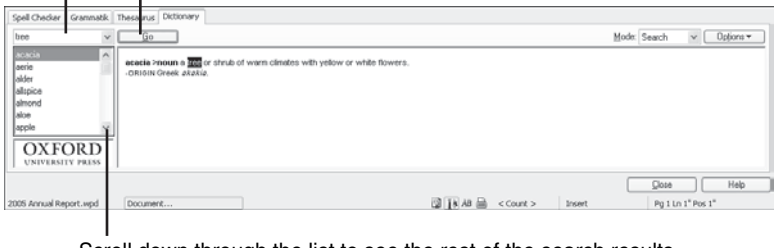


Figure 5.11
With an electronic version of a dictionary, it's a simple task to locate words by searching through their definitions.

LIMITING YOUR SEARCH RESULTS

In some cases, searching through the thousands of definitions in the dictionary produces too many search results. You need a way to narrow the scope of the search. This is done through operators, similar to those used to search through files. If you skipped the file management chapter, operators are used to combine or exclude search terms. To display the operators and build an advanced search:

1. With the Dictionary dialog box displayed, open the Mode drop-down list and choose Search.
2. Choose Options and verify that there is a check mark next to Operators.
3. Type the first word that you want to search for, and then press the spacebar. A pop-up palette of operators opens (see Figure 5.12).
4. Use the Up and Down arrow keys to move through the list of operators. Choose one of the following operators:
   - **Plus sign (+)**—Lets you include more than one word in the search. For example, searching for `tree + flower` produces a list of words that have both "tree" and "flower" in the definitions.

Figure 5.12
Using operators, you can include or exclude words from the search criteria.

- **Minus sign (–)**—Enables you to exclude a word from the search. For example, searching for `tree - flower` results in a list of words with "tree", but not "flower" in the definitions.
- **Asterisk (*)**—Enables you to broaden the search with and/or. For example, searching for `tree * flo` produces a list of words with "tree" and/or words beginning with "flo" or both in the definitions.

5. Press Enter to insert the highlighted operator in the text box.
6. Press the spacebar and type the second word (or partial word); then, press Enter to search the Dictionary.

TIP FROM

If you don't know how to spell a word that you want to search for, you can use the first letter, or the first several letters in the word.

5

SETTING DICTIONARY OPTIONS

As you could with Spell Checker, Grammatik, and the Thesaurus, you can customize how the Dictionary works. Clicking the Options button opens a list of items that help you control the display, lookup, and language settings. The list of options changes depending on which mode you have selected: Look Up or Search.

In the Dictionary dialog box, choose Options to display a list of menu items. A check mark next to an item means that it's already turned on. Choose Upgrade to launch your default Windows browser and open the Corel Web page where you can purchase and download an upgrade for the Dictionary. After you install the upgrade, you'll have the weightier 70,000-word *Oxford English Concise Dictionary* installed.

SWITCHING TO A DIFFERENT LANGUAGE

Writing in different languages is more than being able to enter, display, and print non-English characters. You also need to be able to correct spelling, check grammar, and look up terms in the Thesaurus, in addition to using the proper date conventions and currency symbols. WordPerfect supports multiple languages in three ways:

- You can mark an entire document, or just sections of it, as being in one of the more than 30 languages supported by WordPerfect. Additional language modules can be installed that support the Spell Checker, Grammatik, the Thesaurus, the Dictionary, and Hyphenation.
- You can purchase WordPerfect in a different language so that the menus, prompts, messages, dictionaries, and thesauri are all in that language.
- A Language Resource File (LRS file), which comes with the program and each language module, contains the information for formatting numbers and footnote-continued messages, among other things. You can edit this file to customize these options.

If you want to mark only a section of text, select it first. Otherwise, click in the text where you want to switch to a different language (and thus use different writing tools to check the text). Choose Tools, Language, Settings. The Language dialog box appears with a list of available language modules (see Figure 5.13). Scroll through the list and double-click the language you want.

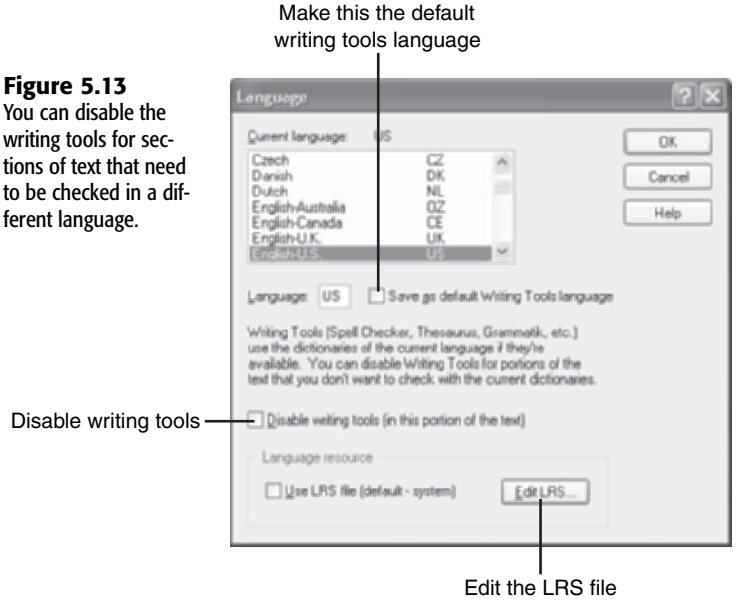
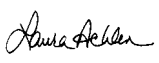


Figure 5.13
You can disable the writing tools for sections of text that need to be checked in a different language.

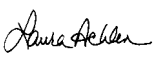
TIP FROM



If you frequently switch back and forth between languages, you might be interested in this feature: You can now display the current language in the application bar. Right-click the application bar (at the bottom of the screen) and then choose Settings. Scroll down through the list, enable the check box next to Language, and click OK. A new Language button appears on the far-right side of the application bar. Click this button to open the Language dialog box.

You can switch to a different language when you're using any of the writing tools. In Spell Checker, Grammatik, or the Thesaurus, select Options, Language to open the Select Language dialog box. Select Show Available Languages Only to display only those languages that are supported by the current writing tool. Select the language you want and then choose OK.

TIP FROM



For anyone that needs to exchange documents that utilize accented characters, WordPerfect Office X3 provides improved support for multilingual characters. This means that characters are more accurately displayed and printed when you create, open, or edit multi-language documents. You can also copy and paste multi-language text within a document, and accented characters are preserved when you save to Rich Text Format (RTF). This very important enhancement makes it easier to share international language documents and improves compatibility with Microsoft Office files created in other languages. Furthermore, because this increases the number of languages and unique characters that are supported, it is now easier for WordPerfect Office to share information with other multilingual products.

SEARCHING FOR TEXT BY USING FIND AND REPLACE

The Find and Replace feature enables you to quickly locate text or codes and replace them if desired. I like to use Find to locate the section of text that I need to work on. (Obviously this isn't necessary for short documents, but for long ones, believe me, WordPerfect can search a lot faster than you can read!)

Here's an example of how you might use the Replace feature with Find: Let's say you accidentally misspelled an important client's name. You can search for all occurrences and replace them with the correct spelling. The same thing goes for codes. If you decide you want to search for a particular font and replace it with another one, you can do it with Find and Replace. To search for (and replace) text, follow these steps:

1. Choose Edit, Find and Replace, or press F2 to open the Find and Replace dialog box (see Figure 5.14).
2. Type the text you want to search for (this might be a complete or partial word, phrase, or number) in the Find text box.
3. Type the replacement text (this should be exact) in the Replace With text box.
4. Click Find Next to start the search.

TIP FROM

You can search for a symbol and replace it with another symbol. Click in the Find text box and press Ctrl+W. Select the symbol from any of the character sets, and then click Insert and Close. Click in the Replace With text box and press Ctrl+W. Select the symbol from any of the character sets, and then click Insert and Close. Choose Find Next. When WordPerfect stops, choose Replace All to do a global replacement.

TIP FROM

If you want to delete all or some instances of the search text, leave `<Nothing>` in the Replace With text box (or leave it blank). As you go through the search, you can selectively replace (or not replace) the search text with nothing, deleting it from the document.

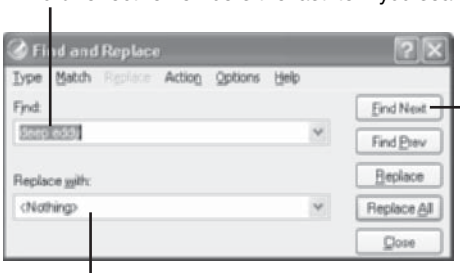
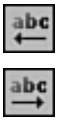


Figure 5.14
You can do complex searches by choosing from the menus in the Find and Replace dialog box.

When WordPerfect locates the search text, you have the following options:

- Click Find Next to continue the search.
- Click Find Prev to move back to the previous instance.
- Click Replace to replace this occurrence of the search text with the replacement text.
- Click Replace All to replace all the rest of the occurrences without further confirmation from you.
- Click Close if you're just using Find to locate your place in a document and you want to get to work.

NOTE



If you've already closed the Find and Replace dialog box, but you need to continue searching, there are two shortcuts that you can use. Press Shift+F2 to find the next occurrence and Alt+F2 to find the previous occurrence. You can also use the QuickFind buttons on the property bar to move to the next or previous instance of the search text.

TIP FROM

Here's a neat trick. You can search for a word without opening the Find and Replace dialog box. First, click on the word you want to search for. Now press Ctrl+Alt+N to search for the next occurrence of that word; press Ctrl+Alt+P to search for the previous occurrence of that word.

SEARCHING FOR CODES

You can extend a search into the document codes to either locate a particular code so that you can edit or delete it, or to replace the code with another one. For example, if you're cleaning up a converted document, you might want to strip out all the extraneous codes. Or, you might want to search for a symbol and replace it with another symbol. Here's how to search for a code:

1. Choose Edit, Find and Replace or press F2.
2. Choose Match, Codes from the menu in the Find and Replace dialog box. This opens the Codes dialog box (see Figure 5.15).

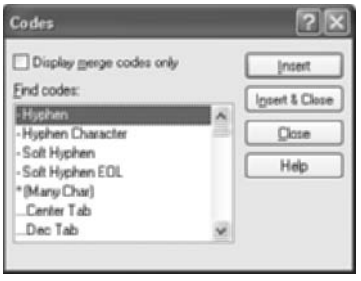


Figure 5.15
Using Find and Replace, you can search for any code in the Codes dialog box.

3. When you find the code you want to search for, click it and then click Insert & Close.
4. Click Find Next. When WordPerfect stops, close the Find and Replace dialog box, and then turn on Reveal Codes. The insertion point is right after the code.
5. To delete the code, press Backspace. Otherwise, double-click the code to edit it.

5

TIP FROM

If you often work with converted documents, Find and Replace can be your best friend. After you identify the codes you want to get rid of, you can search for the codes and delete them. Some documents are so poorly formatted that it's quicker to clean out the codes and start over. Although this might take numerous find and replace operations, it's still faster than manually deleting each code.

To find and replace a code, follow these steps:

1. Complete the preceding steps 1–3.
2. Click in the Replace With text box.
3. Choose Replace, Codes. The same Codes dialog box shown in Figure 5.15 opens. This time, only the codes that can replace the code you are searching for are available. All the others are grayed out. For example, you can't replace a Center Tab code with a Date Format code.
4. When you find the code you want, click it and then click Insert & Close.

5. Click Find Next. When WordPerfect stops, choose Replace to replace this code and move on to the next one; choose Replace All to replace the rest of the codes without further confirmation.

To find and replace codes with specific settings, follow these steps:

1. Choose Edit, Find and Replace, or press F2.
2. Choose Type, Specific Codes to open the Specific Codes dialog box (see Figure 5.16).

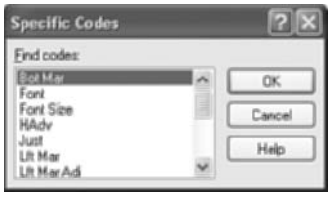


Figure 5.16
To search for a code with a specific setting, select the code from the Specific Codes dialog box. This produces a modified Find and Replace dialog box, where you can choose the setting.

3. Select a code from the list and then click OK. Based on your selection, a modified Find and Replace dialog box appears, with options for you to select the setting that you are searching for. Figure 5.17 shows the dialog box you get after choosing the Font code.

Figure 5.17
When you select Font from the Specific Codes dialog box, you get the Find and Replace Font dialog box.

4. Use the Find and Replace Font dialog box options to specify exactly what you want to find (and replace). For example, you could search for Georgia Bold and replace it with Technical, or you could search for all the 14-point text and replace it with 16-point text.
5. Click Find Next to start the search.

TIP FROM

In the modified Find and Replace dialog box that you get when you're searching for specific code settings, put a check mark in the Replace with Nothing check box if you want to replace the code with nothing, thus deleting it from the document.

TIP FROM

You might not have thought of this yet, but you can combine text and codes in the Find text box to look for text that is followed (or preceded) by a certain code.

RUNNING CASE-SENSITIVE SEARCHES

When you want to search for a word, but only if it's capitalized, you can narrow a search by making it case-sensitive. You can actually make a case-sensitive replacement, too.

For example, if you want to find the word *Water*, but not *water*, type **`Water`** in the Find text box, and then choose Match, Case. The text Case Sensitive appears underneath the Find text box. Click Find Next.

Here's another example: Let's say you want to replace all instances of *water quality ordinance* with *Water Quality Ordinance*. However, you don't want to replace *WATER QUALITY ORDINANCE* with *Water Quality Ordinance*. First, enter the exact phrases, with the correct capitalization, in each of the text boxes. Then click in the Find text box and choose Match, Case. Click in the Replace With text box and choose Replace, Case. The text Case Sensitive now appears under both text boxes (see Figure 5.18). Click Find Next.

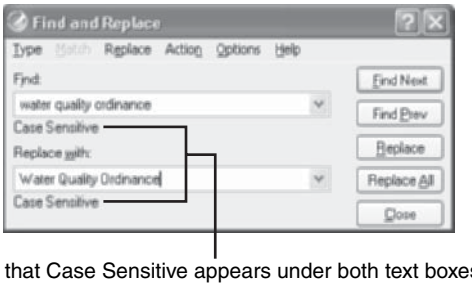


Figure 5.18
When you perform a case-sensitive find and replace, you have to set the Case option for both text boxes.

CAUTION

The settings that you select in the Find and Replace dialog box are "sticky," which means they will be in place the next time you use Find and Replace. If, for example, you do a case-sensitive search, the next time you open the Find and Replace dialog box, the Case Sensitive option will still be turned on. Furthermore, in order to remove it from both the Find and Replace, you must click in each text box, and then choose Match, Case. In addition, you must perform a Find and a Replace to remove those options from the Find and Replace dialog box. For example, if you choose Match, Case for both the Find and Replace text boxes, but you only select the Find option, the next time you open the Find and Replace dialog box, the Case Sensitive option will still be selected for the Replace text box. Only by doing a Find and a Replace can you truly remove the settings (whatever they may be).

OTHER FIND AND REPLACE OPTIONS

I could probably write an entire chapter on all the different types of searches you can do by using Find and Replace. Case-sensitive searches and code searches are the most frequently used of the options available, so they get the most coverage. Some other options might prove helpful:

- Choose Type, Word Forms to find all forms of the word you are searching for. For example, if you search for the word *litigate*, you'll locate *litigating*, *litigation*, and *litigated*, as well as *litigate*.
- Choose Match, Whole Word to find the word only if it appears by itself, and not as a part of a larger word.
- Choose Match, Font to open the Match Font dialog box (see Figure 5.19), where you can select a font, font size, and font attributes. WordPerfect finds the search text only if it has been formatted with the font, size, and attributes that you select. (If you click in the Replace With text box and choose Replace, Font, you get the Replace Font dialog box, which is identical to the Match Font dialog box.)

CAUTION

> The Word Forms option won't work if you have more than one word or if you have codes in the Find text box.

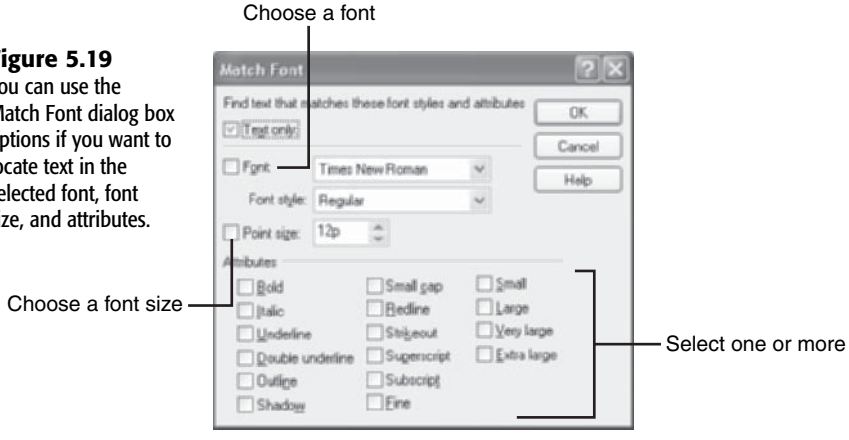


Figure 5.19
You can use the Match Font dialog box options if you want to locate text in the selected font, font size, and attributes.

UNLEASHING THE POWER OF QUICKCORRECT

QuickCorrect automatically corrects common mistakes while you type. QuickCorrect cleans up extra spaces between words, fixes capitalization errors, corrects common spelling mistakes and typos, inserts special symbols, and replaces regular straight quotation marks with typeset-quality curly quotation marks. It also helps you create graphic lines, bulleted lists (recall the discussion of QuickBullets in Chapter 3, "Learning Essential Formatting

Techniques"), ordinal numbers, and hyperlinks to Internet (or intranet) addresses or to files on your network and local hard drive. QuickCorrect is a robust feature with a lot of tools that do some of your work for you.

Choose Tools, QuickCorrect to open the QuickCorrect dialog box . There are tabs for all the different features that fall under the QuickCorrect umbrella. The QuickWords feature is discussed in the section "Setting Up QuickWords," later in this chapter.

ADDING AND REMOVING QUICKCORRECT ENTRIES

QuickCorrect includes an extensive list of frequently misspelled words and typos as well as some symbols you can insert by using just a few keystrokes. After you add your own common typos and their corrections to the QuickCorrect list, you'll spend less time proofing your documents with the writing tools.

To add words or phrases to QuickCorrect, type the word or phrase in the Replace text box. Type the replacement word or phrase in the With text box (see Figure 5.20). Click Add Entry.

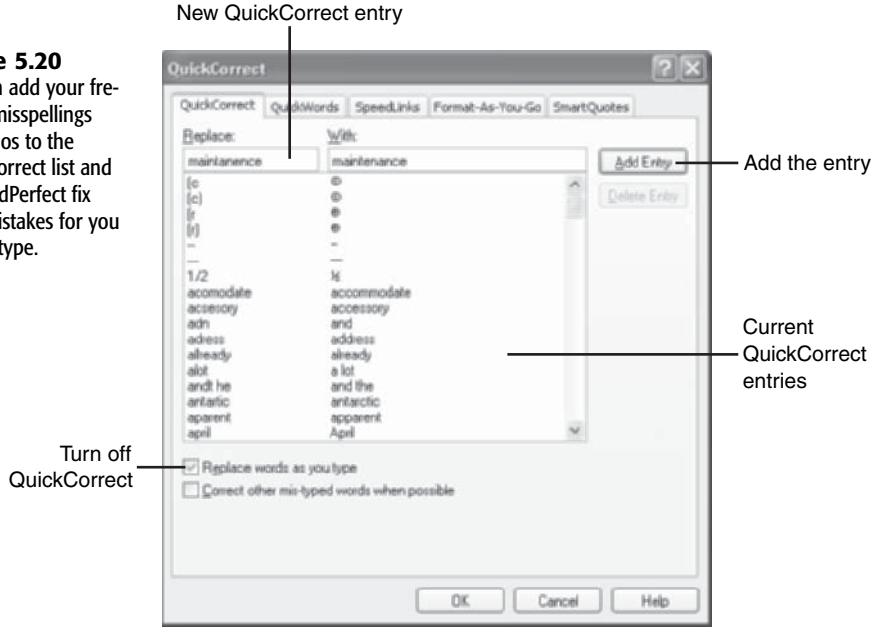
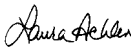


Figure 5.20
You can add your frequent misspellings and typos to the QuickCorrect list and let WordPerfect fix your mistakes for you as you type.

If you don't like QuickCorrect, you can turn it off completely. Choose Tools, QuickCorrect, and deselect Replace Words As You Type (that is, remove the check mark). However, a better solution might be to remove the entries that you don't like so that you can continue to take advantage of those that are helpful. To remove an entry, select it in the list, and then click Delete Entry, Yes.

TIP FROM



Think of ways you can use QuickCorrect to insert long or hard-to-type words when you type a few characters. For example, you could add an entry to replace *wpoX3* with *WordPerfect Office X3* or *dp* with *diaphoresis*.

NOTE

If you've been using WordPerfect 7, 8, 9, 10, 11 or 12, you can use the QuickCorrect entries that you created in those versions. You just need to add the user word list file to the list of user word lists. Choose Tools, Spell Checker, Options, User Word Lists, Add List. Open `wt12us.uwl` for version 12, `wt11us.uwl` for version 11, `wt10us.uwl` for version 10, `wt9us.uwl` for version 9, `wt80us.uwl` for version 8, or `wt61us.uwl` for version 7. You might need to substitute your two-letter country code in place of "us" in the filename.

INSERTING SPEEDLINKS

The SpeedLinks feature creates a hyperlink whenever you type the beginning of an Internet address, such as www, ftp, http, or mailto. For example, when you type the URL www.wordperfect.com, SpeedLinks creates the hyperlink to the Web page. This also works for e-mail addresses such as *`yourname@isp.com`*. You can then give that hyperlink a friendlier name.

Follow these steps to create a SpeedLink:

1. Choose Tools, QuickCorrect, and then click the SpeedLinks tab (see Figure 5.21).
2. Type the friendlier name that you want to use to activate the hyperlink in the Link Word text box (the @ symbol is inserted automatically).
3. Type the location to link it to in the Location to Link To text box. If necessary, click the Files icon to browse your system (or the network) and select a drive, folder, or file. If you are typing an e-mail address, be sure to precede it with `mailto:`.

To insert a SpeedLinks entry in a document, type the `@` symbol followed by the link word. When you press the spacebar or Enter, WordPerfect creates the hyperlink.

TIP FROM

If you often work with hyperlinks, there is a toolbar that you can turn on. Right-click the toolbar and then click Hyperlink Tools. This toolbar has buttons to help you create and edit hyperlinks, move from the next to the previous hyperlink, activate and deactivate hyperlinks, create bookmarks, and edit the hyperlink style. When you're ready to turn it off, right-click a toolbar, and then click Hyperlink Tools again.

If you don't want your URLs turned into hyperlinks, see "Please Stop Creating Hyperlinks" in the Troubleshooting section at the end of this chapter.

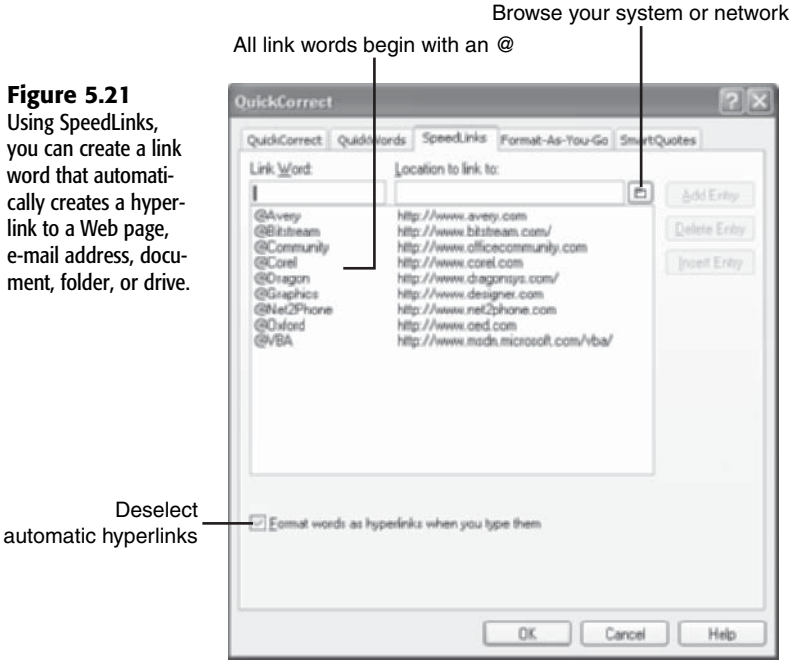


Figure 5.21
Using SpeedLinks, you can create a link word that automatically creates a hyperlink to a Web page, e-mail address, document, folder, or drive.

CUSTOMIZING FORMAT-AS-YOU-GO

The Format-As-You-Go feature helps keep your sentence structure accurate by cleaning up extra spaces between words and sentences. I really like the automatic capitalization at the beginning of a new sentence—I don't have to press that Shift key nearly as often. Format-As-You-Go also fixes most of your capitalization mistakes. For example, if there are two capital letters at the beginning of a word, the second letter is changed to lowercase.

You can choose Tools, QuickCorrect to open the QuickCorrect dialog box, and then click the Format-As-You-Go tab. By default, all the options in the Sentence Corrections section are selected, and End of Sentence Corrections is set to None (see Figure 5.22).

A check mark in the box indicates that a tool is enabled. You can turn these tools on and off by enabling and disabling the check boxes. Choose from the following options:

- **CapsFix**—Fixes problems with capitalization when Caps Lock is on by mistake and you hold down the Shift key to capitalize the first letter (such as tHIS). CapsFix works only if Caps Lock is on.
- **QuickBullets**—Helps you quickly create bulleted lists.

➔ For more information on using the QuickBullets feature to create bulleted lists, **see** "Using QuickBullets," **p. 70**.

- **QuickIndent**—Pressing Tab at the beginning of the first and second lines of a paragraph creates a left indent for that paragraph.

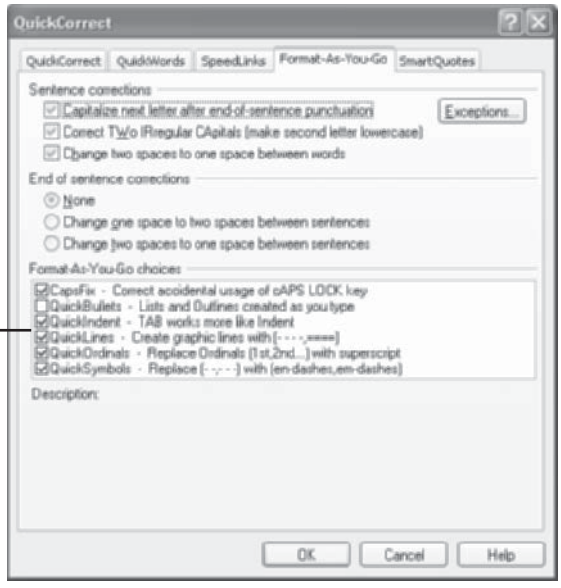


Figure 5.22
The Format-As-You-Go feature has six different tools to help you quickly create bulleted lists, graphic lines, ordinal numbers, en dashes, and em dashes.

Enable the check boxes to turn on the tools

- **QuickLines**—Typing four dashes and then pressing Enter creates a single horizontal line from the left to the right margin; typing four equal signs and then pressing Enter creates a double horizontal line from the left to the right margin.
- **QuickOrdinals**—Typing ordinal text after a number converts the ordinal text to superscript when you press the spacebar.
- **QuickSymbols**—Typing two hyphens followed by a space inserts an en dash; typing three hyphens followed by a space inserts an em dash.

5

TURNING ON SMARTQUOTES

The mild-mannered feature SmartQuotes converts the regular straight quotation marks to typeset-quality curly quotation marks as you type. It doesn't sound like a big deal, but if you're producing materials that should have a more polished appearance, this is one of those small details that can really help. To turn off SmartQuotes or select different quotation characters:

1. Choose Tools, QuickCorrect, and then click the SmartQuotes tab to display the SmartQuotes options (see Figure 5.23) .
2. Deselect the option that you don't want to use.
3. To change the quotation character, click the Open and Close drop-down list arrows and select another character.

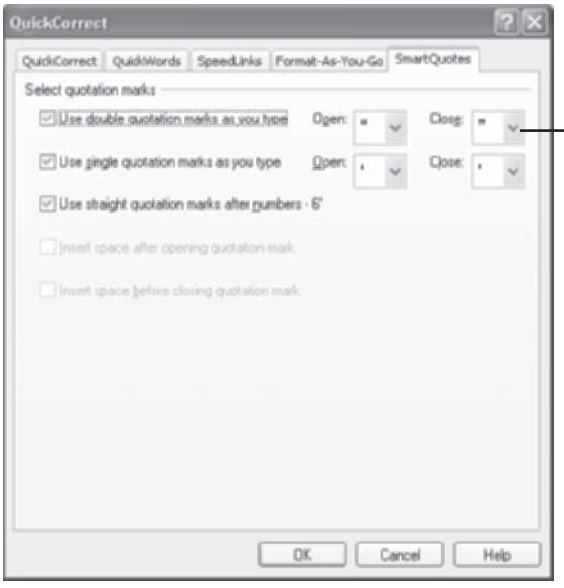
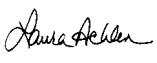


Figure 5.23
The SmartQuotes feature replaces straight quotation marks with curly quotation marks for a more polished, professional appearance.

TIP FROM



You can insert one of the symbols from the Symbols dialog box in place of a quotation character. Select one of the quotation characters, and then press Delete. Press Ctrl+W to open the Symbols dialog box. Select a symbol, and then click Insert and Close.

TIP FROM

If you are working on an older document, or a document that was created by someone who did not turn on SmartQuotes, you can convert the regular straight quotation marks to typeset-quality curly quotation marks with the Find and Replace feature. All you have to do is turn on SmartQuotes, and then search for a quotation mark, replacing it with a quotation mark. I know, it sounds like you're searching and replacing the same thing, but since SmartQuotes is activated, the straight quotation marks will be replaced with curly quotation marks during the Find and Replace. This also works with apostrophes, so you can convert all of your single and double straight quotation marks to curly quotation marks in just two find and replace operations. Pretty cool, if you ask me.

If text is changing automatically and you think your eyes are playing tricks on you, see "The Text Is Changing Right Before My Eyes" in the Troubleshooting section at the end of this chapter.

SETTING UP QUICKWORDS

QuickWords simplifies the process of typing frequently used words and phrases. You assign an abbreviation to a word or phrase, use the abbreviation when typing the document, and then expand the abbreviation. QuickWords isn't limited to words or phrases—you can create

a QuickWord text with formatting codes, such as font attributes, or graphics that you would use for logos.

Some examples of how you might use QuickWords: create QuickWords for phrases that you use often; assign paragraphs to QuickWords and use them to quickly build documents that consist of form paragraphs (such as wills, leases, contracts, and so on); create a QuickWord for your company logo so you can quickly insert it whenever necessary.

Here's how to create a QuickWords entry:

1. Select the text or graphic you want to assign to QuickWords. If you want to insert a graphic or logo with a QuickWords entry, turn on Reveal Codes and position the red cursor to the left of the box code, and press Shift+right arrow to select the box code.
2. Choose Tools, QuickWords to display the QuickWords tab of the QuickCorrect dialog box (see Figure 5.24).

Figure 5.24
With QuickWords, you can assign an abbreviation to text or graphics, and then simply type the abbreviation to insert it into a document.

3. Type the abbreviation you want to use in the Abbreviated Form text box. The abbreviation can be a few letters or a one- or two-word phrase. Note also that you can precede the abbreviation with a forward slash (/) or a back slash (\).
4. Click Add Entry.

NOTE

Try using words that won't normally come up in your documents for QuickWords. For example, you could use /*q* to expand a scientific symbol, *clogo* for the company logo (not just logo), or *will05* for a form paragraph.

CAUTION

If you're creating a QuickWords entry for a graphic image, make sure Expand As Text with Formatting is selected on the Options menu. Otherwise, the graphic won't appear in the document.

TIP FROM

The QuickWords feature has been touted as an accessible alternative to creating macros for inserting frequently used sections of text or graphics. You might want to take a closer look. It's faster, more flexible, and it's notably easier to edit a QuickWords entry than it is to edit a macro.

➔ For more information on creating and running macros, **see** "Using Macros to Automate Repetitive Tasks," **p. 568**.

You can insert QuickWord entries into documents using one of the following methods:

- Type the abbreviation, and then press the spacebar, Tab, or Enter key. If this method doesn't work, the Expand QuickWords When You Type Them option has been disabled. You can manually expand a QuickWord by pressing Ctrl+Shift+A.
- Open the QuickWords dialog box, select a QuickWord from the list, and then choose Insert in Text.

The Options menu has items that control how QuickWords are inserted into a document. By default, QuickWords are expanded as text with formatting. Choose Options, Expand As Plain Text if you want plain text inserted instead.

It's easy to update a QuickWords entry when the form text changes (in the case of form paragraphs) or if you want to insert a different graphic image with a certain QuickWords entry. To replace a QuickWords entry, follow these steps:

1. Select the text or graphic.
2. Choose Tools, QuickWords.
3. Select from the list the QuickWords entry that you want to assign to the selected text or graphic.
4. Click the Options button and choose Replace Entry.
5. Click Yes in the confirmation message box.

You can also rename a QuickWords entry when necessary. On the QuickWords tab of the QuickCorrect dialog box, select the QuickWords entry, and then click Options, Rename Entry. Type the new name, and then click OK.

Every now and then, it's a good idea to go through the QuickWords entries and remove the ones you aren't using anymore. To delete a QuickWords entry, choose Tools, QuickWords. Select the QuickWords entry you want to delete, and then click Delete Entry.

Finally, you can turn off QuickWords if you don't want to expand the QuickWords as you type. In the QuickWords dialog box, deselect Expand QuickWords When You Type Them.

TIP FROM

To expand all the QuickWords at once, choose Tools, Macro, Play, and then double-click `expndall`. See "Running the Shipping Macros" in Chapter 21, "Using Experts and Macros," for more information on the macros that ship with WordPerfect Office X3.

If you're getting an error message when you try to create QuickWords, see "I Can't Create New QuickWord Entries" in the Troubleshooting section at the end of this chapter.

USING VARIABLES

Variables are often overlooked, which is unfortunate, because they can be used to automate many different kinds of documents. You can create a variable code that represents a specific piece of information. You can insert the code in numerous locations, and then update them all at once. For example, in a supplier agreement, you enter the contact's name, payment terms, delivery dates, method of shipment, and so on. During negotiations, these pieces of information need to be updated—a new contact person is taking over, delivery dates have been moved out, the shipper has changed. Instead of conducting multiple search and replace operations, you simply revise the information in each variable and let WordPerfect take care of updating the document.

CREATING VARIABLES

The Variable feature is the perfect tool for documents where the same information appears multiple times because you can define the Variable once and then insert it as many times as you like. The same thing goes for documents where certain pieces of information change every time you use the document—after you insert the variables, you can update the variable definitions and have those changes immediately reflected in the document. To create a variable in a document, follow these steps:

1. Position the insertion point where you want the information to appear.
2. Choose Insert, Variable. The Variables dialog box appears (see Figure 5.25). If any variables have been defined for this document, you'll see them in the list box.

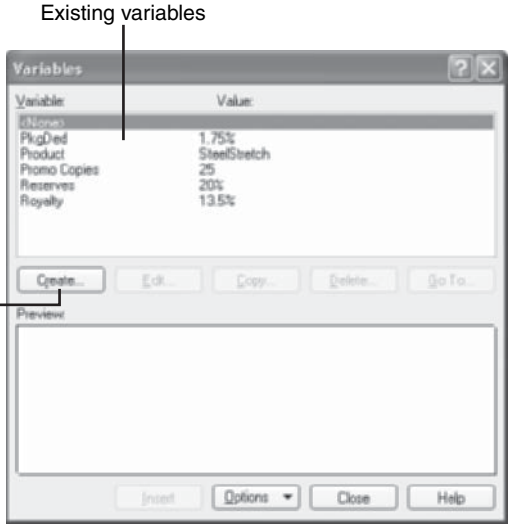


Figure 5.25
Use the Variables feature to insert information that can be edited later and the changes automatically updated in the document.

3. Choose Create to open the Variables Editor dialog box (see Figure 5.26). If you've created or edited styles in the Styles Editor, this dialog box should look familiar.

Figure 5.26
Revisions to a variable are made in the Variables Editor dialog box, which looks similar to the Styles Editor dialog box.

4. Type a name for the variable in the Variable text box. A variable name can contain up to 30 characters.
5. Type a description in the Description text box.
6. Click down in the Contents area and type the text that you want to appear in the document. A variable can hold up to 127 characters, so keep it short and sweet.
7. Use the menus to format the text the way you want it to appear.
8. Use the menus to insert dates, symbols, graphics, equations, and so on.

9. Choose OK to close the Variables Editor dialog box and return to the Variable dialog box. The Preview section of the dialog box shows you how the variable will look when you insert it.
10. Choose Insert to insert the variable in the document.

After you create a list of variables for the document, you can use the following options in the Variables dialog box:

- To insert a variable, select it from the list and choose Insert.
- To edit the content or formatting of a variable, select it from the list and then choose Edit. In the Variables Editor, make the necessary revisions. When you close out of the dialog boxes and return to the document, the document will be updated with your changes. You can also double-click a variable in the document to open the Variables Editor dialog box.
- If you need to remove a variable from the document, select it in the list and then choose Delete. Choose Including Formatting Codes or Leave Formatting Codes in Document, depending on what you want removed from the document.

SAVING AND RETRIEVING VARIABLES

Let's say you've just spent the last 15 minutes inserting variables into a document. When you save the document, you save the list of variables with it. So, what happens when you start to edit another document and there are no variables defined yet? Do you have to start from scratch and create them each time?

Thankfully, no—you don't. You can save a list of variables to a file and then retrieve that into any other document. As a matter of fact, you can retrieve variables from multiple files, so you could build a customized list of variables from a library of variable files.

Beginning in WordPerfect 11, you can save a collection of variables to the default template so they are available for all new documents. If there is an additional objects template in use, you'll be able to save them to that template as well.

Here's how to save a list of variables to a file:

1. Choose Insert, Variable, Options, Save As.
2. In the Save File dialog box, type a filename or browse the system and select an existing file.
3. Choose Save.

Here's how to retrieve a list of variables into a document:

1. Choose Insert, Variable, Options, Retrieve.
2. In the Open File dialog box, type the name of the file, or browse the system and select the file.

3. Choose OK.
4. If necessary, confirm the replacement of current variables. You'll see this message if there are two variables with the same name. You have the option of overwriting the existing variable with a new variable from the file, or leaving the existing variable alone.

Finally, you can specify where to save a collection of variables in the Variable Settings dialog box:

1. Choose Insert, Variable, Options, Settings.
2. Select Default Template (or the Additional Objects Template) in the Save New Variables To section.
3. Choose OK.

TIP FROM

There is a special view option for variables. Choose View, Variables. All the variables in a document will now be shown with blue triangles around them. If you hover over a variable, a QuickTip appears with the name of the variable.

TROUBLESHOOTING

MY NAME IS NOT MISSPELLED

Spell Checker (and Grammatik) stop on my name, company name, company address, and all sorts of other words that are correctly spelled. How can I tell Spell Checker and Grammatik that the word is spelled correctly so that it won't stop on it again?

In either Spell Checker or Grammatik, you can add correctly spelled words to the user word list so they won't stop on the word again (unless, of course, the word is misspelled). The next time that Spell Checker or Grammatik stops on the word, click Add to add it to the selected user word list. Also, make sure you are adding it to the user word list, not the document word list. Choose Options, User Word Lists, and make sure that `WT13US` is selected.

I TRASHED THE USER WORD LIST

I wasn't paying attention and I added a bunch of words to the user word list that I should have added to another user word list file. Is there some way I can revert to the default user word list file without manually removing all the entries?

You can restore the default contents by deleting the file and letting WordPerfect re-create it the next time you start the program. Delete the file `WT13XX.UWL` (where *XX* stands for the language code) in the `\my documents\corel user files` folder in Windows 98/Me, `\documents and settings\username\my documents\corel user files` in Windows 2000/XP, and the `d:\winnt\profiles\<user name>\my documents\corel user files` in Windows NT4.

Note: This solution also works if you open the QuickCorrect dialog box and the QuickCorrect list is empty.

MY WORDS AREN'T BEING ADDED

I just finished spell checking a document, and I see that I added a bunch of words to the word list. Now when I check another document, Spell Checker still stops on those words. What's the deal?

The words that you added during a spell check were inserted in the document word list, which is available only to this document, not the user word list, which is available to other documents. You need to set the user word list as the default word list. In the Spell Checker dialog box, choose Options, User Word Lists, select `WT13XX.UWL` in the list, and then click Set Default.

MY EDITS TO A CHECKING STYLE AREN'T GETTING SAVED

I made some changes to one of the checking styles, but I can't seem to save the edits.

Any of the 11 predefined checking styles can be modified, but you must be sure to choose Save or Save As before you exit the Edit Checking Styles dialog box. If you choose Save, the changes are saved to the selected checking style. If you choose Save As, you can specify another name for the checking style. A modified checking style is shown with an asterisk (*) next to it in the Checking Styles dialog box.

MY SENTENCES ARE NOT TOO LONG

Grammatik is constantly flagging long sentences in my documents. Is there any way I can change this?

Each checking style has its own threshold settings in the Maximum Allowed section of the Edit Checking Styles dialog box. You can increase the number of words in the Long Sentence Length text box to change the threshold setting for long sentences. You can set up to a maximum of 99 words.

Choose Tools, Grammatik, Options, Checking Styles. Select the style you are using, and then choose Edit. Adjust the value in the Long Sentence Length text box. Choose Save to save your changes to the selected checking style, or choose Save As to give the checking style a new name.

THE TEXT IS CHANGING RIGHT BEFORE MY EYES

I'm typing along and my text is changing automatically. If I type **`(c)`** *in an outline, it changes into a copyright symbol; if I put two spaces after the end of a sentence, it changes to one; and I've got outlines appearing out of nowhere. What is going on?*

The Format-As-You-Go feature is a great feature…until it starts changing things that you want left alone. One of the most frequently asked questions is how to turn off the automatic outline feature, which can cause problems if a specific type of numbering style is necessary. Here's how to do it: Choose Tools, QuickCorrect and then click the Format-As-You-Go tab. Deselect the QuickBullets and QuickIndent options.

Another problem is the automatic creation of common typographical symbols. As mentioned previously, typing `(c)` creates the copyright symbol. This is part of the QuickCorrect feature, so open the QuickCorrect dialog box and, if necessary, click the QuickCorrect tab.

Select the entry for `(c)`—the second entry—and choose Delete Entry. You can go through the QuickCorrect list and selectively delete the entries that are apt to cause you trouble. Or, you can turn off QuickCorrect altogether by removing the check mark next to Replace Words As You Type.

Some people don't want the regular quotation marks changed to curly quotation marks. If you're one of them, open QuickCorrect and click the SmartQuotes tab. Remove the check marks next to the first two options.

Depending on your situation, one or more of the QuickCorrect tools can be a source of irritation! For the most part, it's better to selectively disable the options that you don't want, rather than lose out on all the functionality that QuickCorrect offers.

Please Stop Creating Hyperlinks

I'm typing in addresses for Web sites and I don't want WP to automatically turn into hyperlinks. Is there some way to turn this off?

Absolutely! This is another aspect of the QuickCorrect feature that can be turned off whenever it becomes inconvenient. First, choose Tools, QuickCorrect and then click the SpeedLinks tab. Remove the check mark from the Format Words As Hyperlinks When You Type Them check box. Choose OK. This will prevent WP from creating hyperlinks while you type. If you already have hyperlinks in the document, and you want them to stop acting like hyperlinks, choose Tools, Settings and then click the Environment tab. On the General tab, remove the check mark from the Activate Hyperlinks check box. Finally, if you want to turn the links into plain text so they don't display as blue underlined text, turn on Reveal Codes and delete the hyperlink code before or after the text. Remember, the quickest way to delete a code is to click and drag it out of the Reveal Codes window.

I Can't Create New QuickWord Entries

I'm trying to create a new QuickWord entry, but when I choose Add Entry, I get an error message and WordPerfect locks up. When I restart WordPerfect, the entries that I had successfully created are gone and all I have is the list of sample entries that are installed with the program. What am I doing wrong?

You're not doing anything wrong, so just relax. This is a known problem that occurs when QuickCorrect entries are longer than 22 characters. For some reason, this affects QuickWords. Open QuickCorrect and look for entries longer than 20 or so characters and delete them. Try to create a new QuickWord again. If this works, re-create the long QuickCorrect in QuickWords, which does not impose a limit on the number of characters.

CHAPTER 6

Printing, Faxing, and E-Mail

In this chapter

by Laura Acklen

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THE BASICS OF PRINTING

Despite predictions of the "paperless office," the end result of most WordPerfect documents is still printed pages. This way of thinking and working might be changing as we move toward publishing documents to the World Wide Web, or as we share documents via e-mail. But the printer continues to be an important part of the office, and printing is one of the essential tasks for any user of WordPerfect.

SELECTING A PRINTER

WordPerfect is a *WYSIWYG* (what you see is what you get) program. However, to truly see onscreen what your document will look like, WordPerfect has to know what printer you are planning to use so it can display the proper fonts and print attributes. To select a printer, follow these steps:

1. Choose File, Print or click the Print button on the toolbar to display the Print dialog box (see Figure 6.1). (If necessary, click the Main tab so your dialog box matches the one shown in Figure 6.1.) The options you see here may vary, depending on your printer's features.

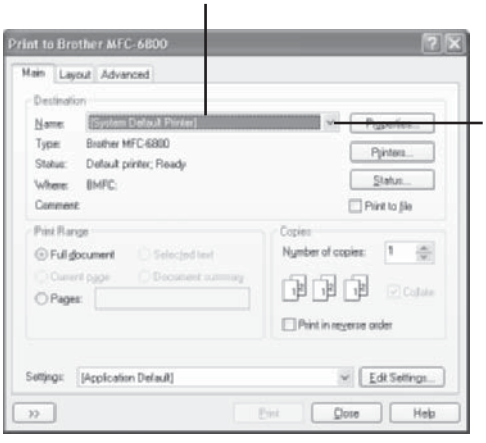


Figure 6.1
WordPerfect's Print dialog box is where you will choose from a variety of print and layout options.

2. In the Destination Name list box, WordPerfect displays the currently selected printer, which may appear as (System Default Printer). This is the default printer as specified in Windows. If the printer name displayed is the printer you will be using, you can click Close to return to your document, or you can proceed to print your document.
3. If the printer is not correct, open the drop-down list and select from the printers or fax drivers that have been installed in Windows.
4. Select the printer to which you want to print.
5. Click Close to return to your document.

TIP FROM

You can quickly check which printer is selected by moving the mouse pointer to the printer icon on the application bar. A QuickTip appears that displays the name of the currently selected printer. If this is not the printer you want, click the printer icon to open the Print dialog box, where you can change the selected printer.

NOTE

If you don't have the proper printer selected, you can still change the printer before printing. However, some formatting probably will change, including some printer fonts, line spacing, and so on. If you know the printer you'll use, it's best to choose it before spending too much time on your document.

CAUTION

If you are connected to a network, you might have access to several different printers that are also connected to the network. Be careful, however, to select only those printers where you really want to print. Otherwise, you might end up sending a print job to a printer in a far-flung area of the company or, worse, to someone who shouldn't see your printed output.

If you get error messages telling you that WordPerfect is unable to access the printer, see "Printer Error Messages" in the Troubleshooting section at the end of this chapter.

PREVIEWING PRINTED OUTPUT

To preview your document before printing, choose File, Print Preview. Print Preview zooms the document to a full-page view, thus enabling you to see the whole page while at the same time enabling you to edit the document (see Figure 6.2). The Print Preview toolbar also appears, helping you to perform tasks that typically precede printing. These include the following:

- **Ruler**—Click this icon to display a ruler above the document to help you verify page layout measurements.

- **View Page**—This default Print Preview view displays a full page of the document. Although the text is usually too small to read, you still can edit or modify the page layout while in Print Preview.

- **Two Page View**—This option shows two pages, side by side.

- **Zoom**—If you want to see the document close up, you can zoom in using this option.

- **Spell Checker**—One of the last things you do before printing is check the document's spelling. This icon makes it easy to access Spell Checker.

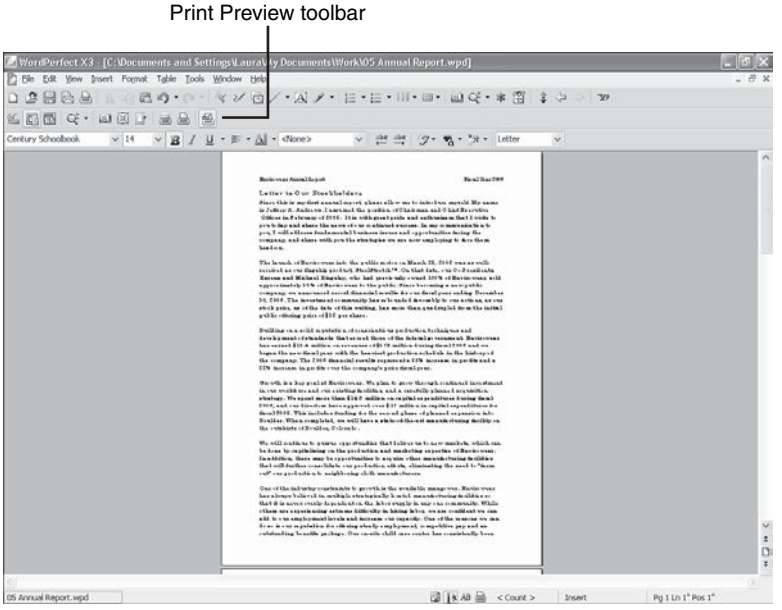


Figure 6.2
You can use Print Preview to preview the document layout before printing.

- **Make It Fit**—If after previewing your document you decide you need to squeeze your document into fewer pages, use this icon to access the Make It Fit feature.

- **Page Setup**—If you decide to change the paper size or orientation, access the Page Setup dialog box with this icon.

- **Print Document**—This option sends the document directly to the printer, bypassing the Print dialog box.

- **Print**—If you want to make changes in the number of copies or which pages to print, access the Print dialog box by clicking this icon.

- **Print Preview**—Click this icon to turn off Print Preview.

If you are satisfied with what you see in Print Preview, and if you want to print a single copy of the entire document, you can send the document directly to the printer by clicking the Print Document icon. Otherwise, click the Print icon to proceed to the Print dialog box (refer to Figure 6.1).

TIP FROM

If you want to bypass the Print dialog box, simply press Ctrl+Shift+P. Unless you have made changes previously in the Print dialog box, this prints a single copy of the entire document.

PRINTING MULTIPLE COPIES

One of the more commonly used printing options is to specify the number of copies of the document you want to print. To change the number of copies, simply change the number in the Number of Copies text box.

If you choose to print more than one copy, by default WordPerfect groups the copies as illustrated in the Copies area of the dialog box. You can also choose to collate copies by checking the Collate box.

PRINTING SPECIFIC DOCUMENT PAGES

Although you typically print a full document (WordPerfect's default), you can also print selected pages of the document. The options on the Main tab of the Print dialog box include

- **Current Page**—This option prints only the page on which the cursor currently resides.
- **Pages**—Using this option you can choose a range of pages, or specific nonsequential pages. For example, if you need to print pages one through four, you type `1-4`. If you also want to print page 15, you type `1-4, 15` in the text box. If you type a page number followed by a dash, WordPerfect prints from that page number to the end of the document. For example, `4-` prints page four and everything that follows it.

NOTE

> If you click the Advanced tab of the Print dialog box, you see options for printing multiple pages or labels, secondary pages, chapters, and volumes. However, under the Main tab you can indicate only page numbers.

CAUTION

> The numbers you enter in the Pages text box must be in numeric order; otherwise, all the pages might not print. For example, if you specify `12-15, 4`, only pages 12–15 print. To print these specific pages, you must enter `4, 12-15`.

- **Selected text**—If you have selected text before accessing the Print dialog box, this option prints only the selected text.

NOTE

> When you choose to print selected text, the output appears on the printed page in the same location in which it would have appeared had you printed the surrounding text. For example, if you select the last paragraph on the page, the paragraph prints by itself at the bottom of the page.

If you try to print and nothing happens, see "When Nothing Happens" in the Troubleshooting section at the end of this chapter.

CONTROLLING PRINT JOBS

When you ask WordPerfect to print something, you create a *print job*. Both WordPerfect and Windows enable you to check the status of any current print jobs and to control multiple print jobs. To control a print job from within WordPerfect, follow these steps:

1. Open the Print dialog box by choosing File, Print, clicking the Print button on the toolbar, or clicking the printer icon on the application bar.
2. Click the Status button. WordPerfect displays the Print History and Status dialog box (see Figure 6.3), which in turn displays information about the various WordPerfect print jobs waiting to be printed, along with a list of recently completed print jobs.

NOTE

> If you don't see any print jobs in the Print History and Status dialog box, choose Display, and uncheck Hide Completed Jobs.

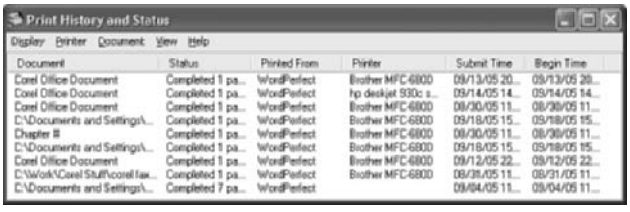


Figure 6.3
WordPerfect's Print History and Status dialog box provides information about current as well as recent print jobs, and enables you to pause or cancel print jobs in progress.

3. Locate and select the print job you want to control and then choose from the following options:
   - Choose Document, Pause Printing if you want to temporarily pause printing.
   - Choose Document, Cancel Printing to stop the print job, even if it's in progress.
   - Choose Document, Remove to delete a print job from the list.
4. When you are finished, click the Close button on the title bar to clear the Print History and Status dialog box and return to the Print dialog box.

WordPerfect's Print History and Status dialog box works the same as the Windows Printer dialog boxes, but the Windows dialog box is a bit easier to access. When you begin printing, Windows displays a printer icon on the Windows taskbar. Double-click the icon to display the Printer dialog box (see Figure 6.4). You then can select a print job and pause or cancel it.

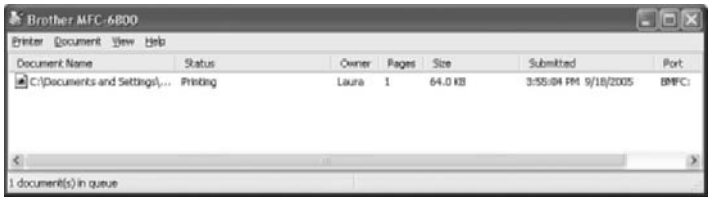


Figure 6.4
The Windows Printer dialog box is similar to the WordPerfect Print History and Status dialog box, but is easier to access, thus enabling you to more quickly cancel a print job.

NOTE

> You can pause or cancel the printing of all documents on a printer that is attached to your computer. If you are using a network printer, you might see other print jobs listed that are not yours. However, you can pause or cancel only your own documents.

USING PRINT OPTIONS

You now know about some of the most common printing tasks and procedures you are likely to encounter. WordPerfect also offers a wide array of options for printing nearly any kind of document.

MAIN, LAYOUT, AND ADVANCED OPTIONS

On the Main tab of the Print dialog box (refer to Figure 6.1), you can use the following options:

- **Print in Reverse Order**—Depending on how your printer stacks pages as they're completed, you might want to print the pages in reverse order.
- **Printers**—In the Destination section, you can add a printer by clicking the Printers button, which is the same as accessing the Windows Start button, and choosing Control Panel, Printers and Faxes. Here you can even specify whether this is a fax printer (see the section "Faxing Documents" later in this chapter).
- **Properties**—The options available in the dialog box that appears when you click the Properties button vary depending on the printer you have selected. In earlier versions of WordPerfect, you could specify printer resolution. However, because resolution really is dependent on the printer, WordPerfect now lets you select that and other options in the printer Properties dialog box.
- **Document Summary**—This option prints only the document summary but none of the body of the document.
- **Print to File**—By default, your print job goes to the printer device specified in the printer setup—for example, to a local printer or to a network printer. However, you can also send the output to a file if you choose Print to File. Then when you click Print, WordPerfect asks you for a filename. Use this option if you want to copy a print image directly to a printer—for example, a PostScript file to a PostScript printer.

The Layout tab offers several options for enlarging or reducing your text, or for double-sided printing. However, two specific options that can be used with all documents are

- **Print File Information**—If you select this option, WordPerfect prints the file location of your document in a small font at the lower-left corner of each page of your document.
- **Show Crop/Fold Marks**—This option is most useful if you print subdivided pages and need to know where to cut or fold the resulting printed pages. However, you can also print crop marks on any document you print.

For more information on the other options in the Layout tab, click the Help button to display a list of help topics for the Layout tab.

On the Advanced tab of the Print dialog box (see Figure 6.5), you find the following advanced options:

Figure 6.5
The Advanced tab of the Print dialog box enables you to control output options, such as color, graphics, and paper feed.

- **Document on Disk**—You need not open a file before you print it. Simply enable this option and then click the Browse button to locate the file you want to print. Double-click the file, or select the file and then choose Open. WordPerfect then prints the file directly from your disk to the printer.
- **Print in Color**—Color printing is more often affected by the printer setup than by the WordPerfect setting. If you're having a problem printing in black and white only, try deselecting Print in Color and see if that works. If you have a laser printer that prints only in black and white, the color options are not available.
- **Print Text Only**—Choose this option if you don't want to print your graphic images (for example, in a draft). WordPerfect still preserves the formatting of the text, leaving blank spaces where the graphics would normally print.
- **Print Text As Graphics**—If for some reason your printer doesn't print text properly, you might try selecting this option. For example, some laser printers don't print white text on a black background (such as in a table heading), or they print text that should be hidden by graphic images. Choosing this option overcomes these limitations.

If your graphics don't look good, see "Better Graphics Printing" in the Troubleshooting section at the end of this chapter.

- **Print Reveal Codes**—Starting in WordPerfect 11, you can print the document with the text and codes shown for fast and effective troubleshooting.
- **Use Graphic Transparency**—Many Internet graphic images, such as transparent GIF images, have a single-color background that displays as a transparent background. By default, WordPerfect does not print such backgrounds. Deselect this option if you want WordPerfect to print solid color graphic backgrounds.
- **Keep Print History**—If you *don't* want WordPerfect to keep track of your print jobs, deselect this option. Print jobs still appear in the Print History and Status dialog box, but only until the print job is completed, after which they disappear.
- **Reset Number of Copies Each Time**—If you choose to print more than one copy, on the Main tab of the Print dialog box, WordPerfect remembers that number until you close your document. Choosing this option forces WordPerfect to reset the number of copies to one after you print the document. If you tend to forget that you've changed the number of copies, choosing this option can help you avoid wasting paper for copies you don't want.
- **Paper Feed**—If you have chosen a paper size that is smaller than the typical 8 1/2 inches by 11 inches, WordPerfect attempts to determine where in that 8 1/2-inch range to print the document. For example, if WordPerfect knows that your printer feeds envelopes along the left side, it prints the text of the envelope there as well. For some paper sizes, you can specify where you want to insert them: at the left, center, or right of the printer tray or manual feed slot. You might have to experiment to get the location just right when using non-standard paper sizes.

TWO-SIDED PRINTING

In most cases you'll probably print your documents single-sided. However, if you need to print on both sides—for example, when printing a booklet—WordPerfect can help you. Simply access the Print dialog box and click the Layout tab (see Figure 6.6). Then choose from among these options:

- **Use Document Settings**—Depending on the type of document you're printing, two-sided printing might already have been chosen for you. If you want to force single-sided printing, choose Off.
- **Manual**—If your printer doesn't support automatic two-sided printing (and most don't), you'll have to print all the odd pages, turn the stack of printed pages over, reinsert them in the printer, and then print all the even pages. Choose Step 1 to print the odd pages, and Step 2 to print the even pages.
- **Automatic**—If your printer does support two-sided printing, you can further choose to print the pages for binding along the side, as in a book, or along the top, as in a tablet. Simply choose Book for side-to-side printing, or Tablet for top-to-bottom printing.

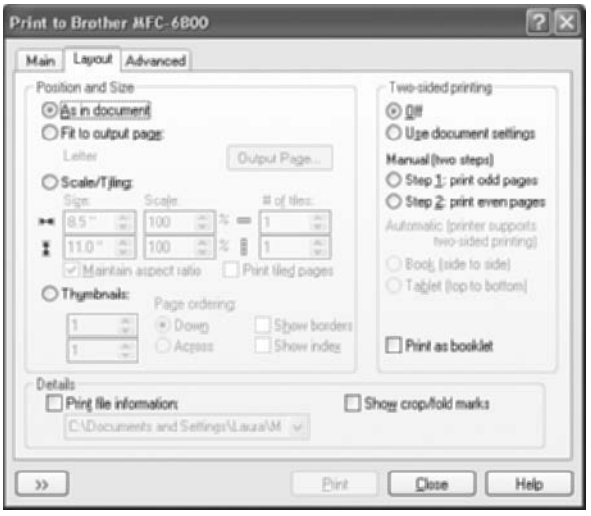


Figure 6.6
You can use the Layout tab of the Print dialog box to print posters or thumbnails of your document, or to scale your document pages to different paper shapes and sizes.

- **Print As Booklet**—If you format your pages for booklet printing, this option tells WordPerfect to organize the half pages in the sequence required for a folded booklet (see "Printing Booklets," later in this chapter).

ENLARGING AND REDUCING PRINT OUTPUT

Life would be simple if all you ever had to do was print your documents to standard *portrait* orientation (8 1/2 inches wide by 11 inches tall) or standard *landscape* orientation (11 inches wide by 8 1/2 inches tall). Fortunately, WordPerfect recognizes that you sometimes need to print both larger and smaller versions of documents.

One common printing need is for posters that display larger than one page. For example, if you are making a presentation and want the audience to be able to read a printed page, you could create a poster that consists of up to 10 pages wide and 10 pages tall.

To create a poster, first create the page in WordPerfect as you normally would. Then follow these steps:

1. Access the Print dialog box.
2. Click the Layout tab. WordPerfect displays options for enlarging and reducing your printed output (refer to Figure 6.6).
3. Choose Scale/Tiling.
4. Click Print Tiled Pages.
5. Specify the number of tiles you want, up to 10 tiles.
6. Click the Layout Preview button on the title bar of the Print dialog box to preview the layout you have specified (see Figure 6.7).

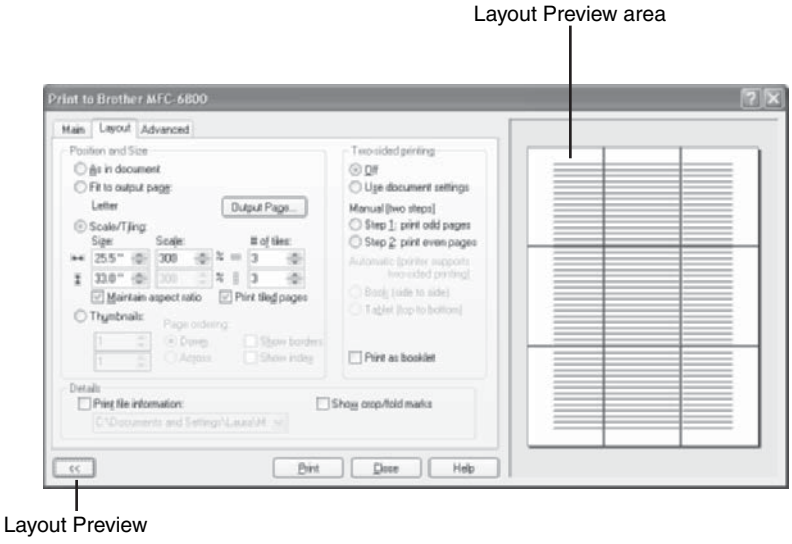


Figure 6.7
The Layout Preview box shows how your document is tiled across several pages to enable you to create a poster.

NOTE

> WordPerfect does not display an actual preview of your document, but only a preview of the page layout. Also, the resulting printed pages are complete pages expanded or squeezed to fit the page layout you select.

7. Click Print to print the document. After WordPerfect prints the pages, you must trim and paste the pages together to complete the poster.

You can also specify the exact size of the printed document. For example, if you want to create quarter-page printouts, choose the Scale/Tiling option, and then specify the percentage (for example, 50%).

NOTE

> Remember that 50% is half the height and *also* half the width. You probably need to experiment with size settings until you get a feel for what works best.

A *thumbnail* is a small, but complete, view of a page, which gives the reader an idea of what the full-size page contains. Several thumbnails can be included on one full printed page. If you want a thumbnail summary of your document pages, choose the Thumbnails option from the Layout tab. You then can choose the following options (see Figure 6.8 with some options already selected):

- You can specify how many thumbnails you want per page, up to 10 across and 10 down.
- You can select the order of the thumbnail pages, either across or down.

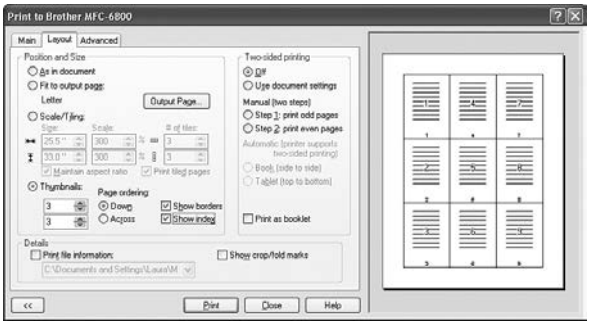


Figure 6.8
To create a summary of your document, you can print several thumbnail pages on one page.

- You can show borders around each thumbnail, to help set them off and make them appear more like printed pages.
- You can also choose Show Index to display a page number beneath each thumbnail.
- You can select the size and shape of the output page (for example, a landscape page) by clicking the Output Page button, used also for the Fit to Output Page option.

After you determine the options you want, click Print to print the page of thumbnails.

PRINTING ENVELOPES, LABELS, AND BOOKLETS

Certain documents, such as envelopes, labels, or booklets, must be printed to nonstandard forms. When you set up the page size for these types of documents, WordPerfect automatically knows how to format the output to fit those particular page sizes.

CREATING AND PRINTING ENVELOPES

Despite the capability to fax and e-mail documents from within WordPerfect, some of us still mail them out the old-fashioned way—in an envelope. And why not? With WordPerfect it couldn't be any easier!

To create an envelope, follow these steps:

1. Open the Format menu and choose Envelope. The Envelope dialog box appears (see Figure 6.9).

NOTE

When you already have a document open that includes an address at the beginning, separated from the body of the text by two hard returns, WordPerfect's envelope feature usually finds that address and automatically places it in the Mailing Address text box. If not, you can type it in the Mailing Address box, or click Cancel, select the text of the address and press Ctrl+C to copy it from the document, choose Format, Envelope, click in the Mailing Address text box, and then press Ctrl+V to paste the address into the box.

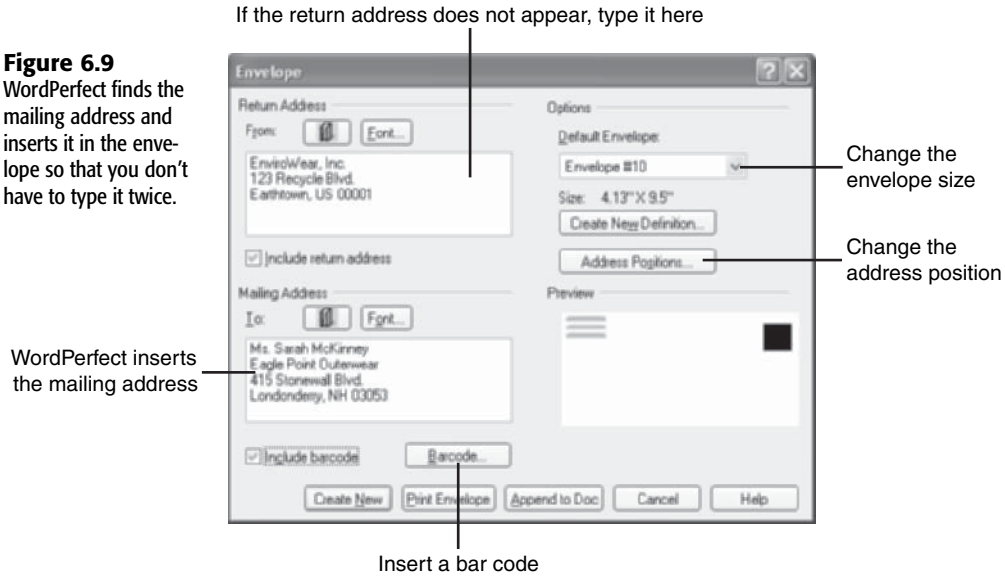


Figure 6.9
WordPerfect finds the mailing address and inserts it in the envelope so that you don't have to type it twice.

CAUTION

> You might see the following message (instead of the Envelope dialog box): "The Template feature allows you to enter information about yourself that will personalize your templates. You need only enter this once."
>
> You have a choice: You can either create a record in the Address Book with your personal information now, in which case WordPerfect will automatically insert your return address, or you can skip this step and type your return address in the envelope manually. Keep in mind if you skip the step of entering your personal information, you'll be prompted to do it every time you try to do something that involves a template.

➔ For more information on personalizing templates, **see** "Filling in Personal Information," **p. 476**.

2. If a return address does not appear in the From text box, or if you want to modify the address, you have a couple of options:
   - Click in the From text box and enter the information.
   - Click the Address Book icon if you want to select an address from any of the available address books (which vary depending on your e-mail capabilities).

3. If necessary, you can do the following:
   - **Use another mailing address**—You can either manually replace the mailing address or click the Address Book icon and choose a mailing address from one of the available address books.
   - Click the Font button to change the font and/or font size for the return address and mailing address. For example, the Arial font is often easier to read on an envelope than is Times Roman, or other fonts typically used in text documents.

NOTE

> If you change the font for either the return or mailing addresses, that font remains in effect the next time you create an envelope. This is sometimes called a *sticky* setting because it doesn't change when you exit WordPerfect.

- **Insert a bar code**—Click the Bar Code button, and then if WordPerfect hasn't already added the ZIP Code from the envelope's address, type the recipient's ZIP Code, and choose a position for the bar code.
- **Adjust the address positions**—Click the Address Positions button, and then adjust the placement of the return and mailing addresses.
- **Choose a different envelope size**—Click the Default Envelope drop-down list arrow, and then choose a size from the list.

NOTE

> When you first install WordPerfect, there is no default envelope setting. Thus, the Envelope dialog box presents a list of envelope sizes and the first item in the list is the 6¾" envelope. You'll need to select your preferred envelope size (in many cases, the #10 envelope) from the Default Envelope drop-down list. The setting is "sticky" so you'll only have to do it once.

4. When you're finished, choose from the following:
   - Click the Create New button if you want to place the envelope in a new document.
   - Click the Print Envelope button to send the envelope directly to the printer.
   - Click the Append to Doc button if you want to place the envelope at the bottom of the current document.

Figure 6.10 shows a typical envelope, as a separate document, ready to print.

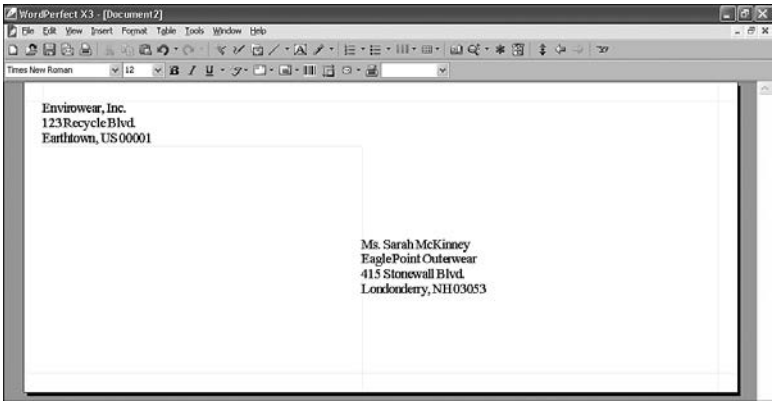


Figure 6.10
After you enter the information in the Envelope dialog box, WordPerfect positions it on the envelope.

TIP FROM

If your envelope is appended to a document and you want to print just the envelope, position your cursor on the envelope page. Then choose File, Print, and select Current Page.

If your envelopes don't seem to be printing correctly, even when you know you have the proper form selected, see "Getting My Envelopes to Print" in the Troubleshooting section at the end of this chapter.

PRINTING LABELS

Labels are another different-size form, but generally labels come on a standard 8 1/2-inch by 11-inch sheet, or for a dot-matrix printer, on a continuous roll.

Typically, you choose a label layout *before* you create the labels themselves. To set up labels correctly, choose Format, Labels. WordPerfect displays the Labels dialog box (see Figure 6.11). You then can choose from the entire list of label definitions, or just from the Laser-printed, or Tractor-fed labels. The preview box displays the label definition you choose.

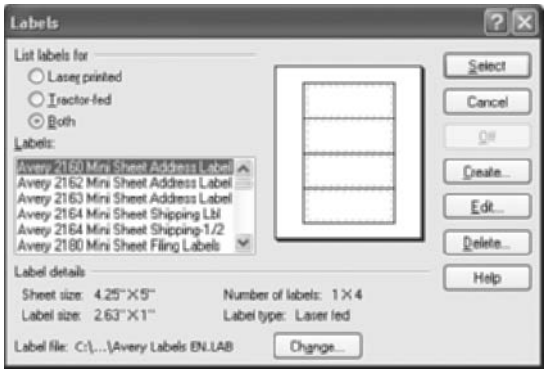


Figure 6.11
WordPerfect formats entire pages of labels, as shown in the preview box of the Labels dialog box.

Assuming you've defined your labels correctly, you simply open the Print dialog box and choose Print.

WordPerfect defines each label as a separate page. Thus, if you specify that you want to print only pages 1–15, the first 15 labels print, leaving blank the last 15 labels on a 30-label page.

TIP FROM

If you're using an inkjet printer, you can reuse a partially used sheet of labels by making sure that the first label you want to print corresponds to the first available label on the sheet. For example, to begin with label 16, open the Print dialog box, and choose Print Pages, Beginning at 16.

CAUTION

> You might be tempted to send a partially used sheet of labels through your laser printer again to print on the unused labels. However, the heat process from printing the sheet the first time can loosen unused labels, causing them to come off in the printer the second time around. Removing stuck labels from inside a laser printer is both time-consuming and costly.

➔ For more information on creating labels using WordPerfect's Merge feature, **see** "Merging to Labels," **p. 524**.

PRINTING BOOKLETS

You can divide pages to print in a booklet style (with pages folded in half). Typically, you use landscape orientation so that each half page ends up 8 1/2 inches tall by 5 1/2 inches wide. Then, using WordPerfect's booklet feature, you can print the pages so that they are numbered and ordered automatically.

NOTE

> Booklets are like labels in that more than one page is printed on each sheet of paper. However, you can only print booklets that contain two booklet pages per sheet of paper.

To set up booklet printing, follow these steps:

1. Choose File, Page Setup to access the Page Setup dialog box.
2. Choose the target paper size, typically Letter size (8 1/2 inches by 11 inches).
3. Choose the paper orientation, typically Landscape.
4. Set your margins as desired. In booklets, 1-inch margins are too large, so choose something smaller, such as 1/2 inch.
5. Click the Layout tab (see Figure 6.12).
6. In the Divide page section, choose 2 Columns (commonly used with landscape pages), or 2 Rows (often used with portrait pages). Note how the pages look in the preview box with 2 columns selected (see Figure 6.12).
7. Choose OK to return to your document.

Your pages are now formatted to fit in a half-page–size booklet. However, you also want WordPerfect to organize the printed pages so that they appear in the proper order. Thus, you won't have to cut and paste the pages to prepare them for the duplication.

To illustrate, normally if you print a four-page booklet, WordPerfect prints page 1 on the left side of the first sheet and page 2 on the right side of the first sheet (see Figure 6.13).

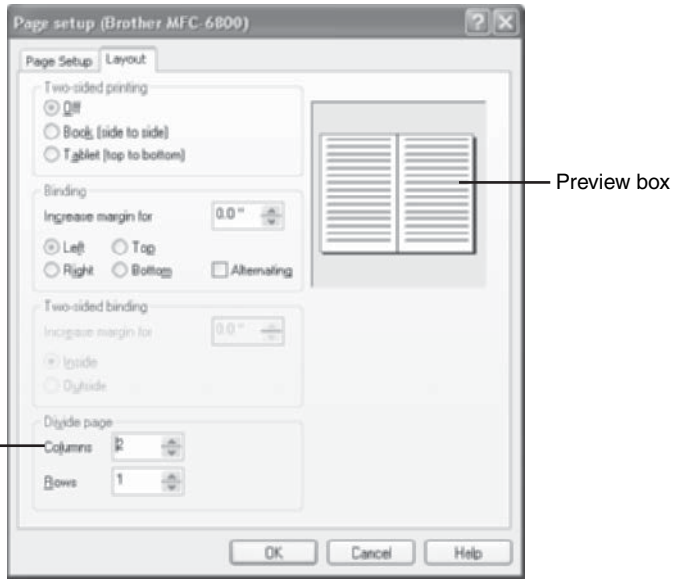


Figure 6.12
When setting up a booklet, reduce the margins and use Divide Page to specify what type of booklet you want.

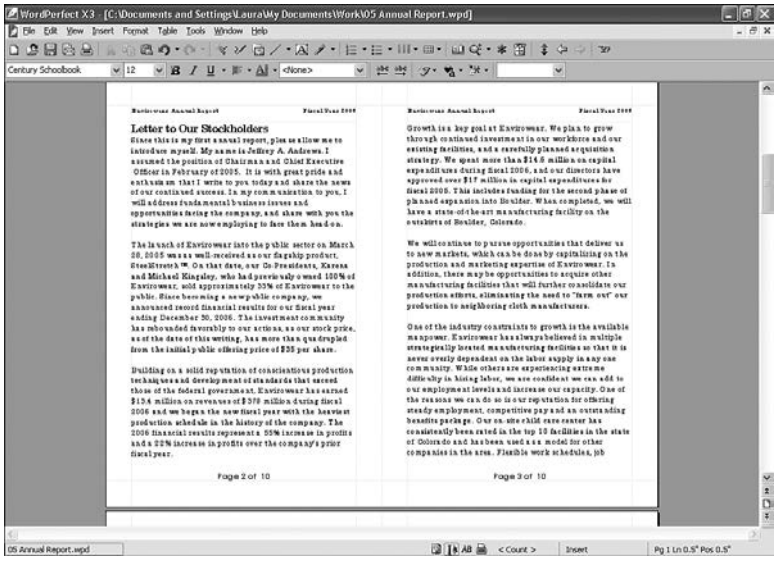


Figure 6.13
Normally, WordPerfect prints divided pages sequentially, which is proper for some folded brochures, but doesn't work for folded booklets.

Instead, you want page 4 on the left side of the first sheet, and page 1 on the right side (see Figure 6.14). On the back side, you want page 2 on the left side and page 3 on the right side.

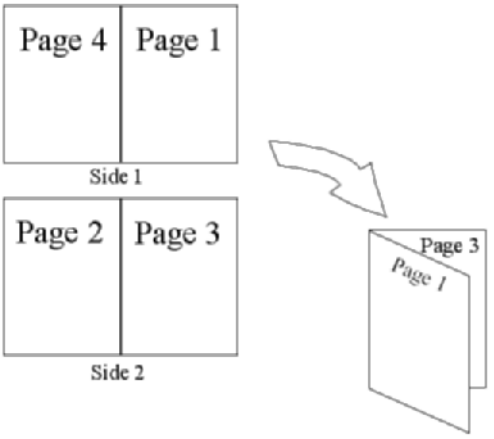


Figure 6.14
WordPerfect's booklet printing option organizes divided pages properly so that they appear in proper sequence for a folded booklet.

To print booklet pages in the proper order, first make sure that the booklet pages have been formatted as previously described. Then, access the Print dialog box, click the Layout tab, and check the Print As Booklet check box. Also select any two-sided printing options that match your printing situation. Generally, Use Document Settings works for most printers.

Finally, print the document. WordPerfect automatically arranges all the pages correctly and begins to print all of one side of each sheet of paper. If your printer does two-sided printing manually, WordPerfect then prompts you to reinsert the pages to print the second side of the paper.

NOTE

When you save a document formatted for booklet printing, WordPerfect does not remember that setting. If you open such a document, be sure to access the Layout tab of the Print dialog box and select the Print As Booklet option before printing the booklet.

TIP FROM

If you plan to take the printed output to a printer or duplicating service, you do not need to reinsert the pages. Simply click OK when prompted to reinsert a page, and WordPerfect prints the second sides on new sheets of paper. Even easier, you can turn two-sided printing Off on the Layout tab of the Print dialog box. It's easier for a commercial printer to duplicate single-sided sheets than sheets that have been printed on both sides.

TIP FROM

The first time you print double-sided booklets, you might have to experiment with your printer so that the reinserted sheets print properly. Start with a short (for example, four-page) test booklet to try it out before printing a longer booklet.

USING CUSTOM PRINT SETTINGS

Sometimes you use a customized printing procedure over and over again. WordPerfect lets you save customized settings so that you can recall them quickly when needed.

Suppose, for example, you have a standard report that requires you to print in a booklet format. Follow these steps to save and use a custom print setup:

1. From the Print dialog box, make the various setup changes you need to print exactly what you want (for example, choose Print As Booklet from the Layout tab).
2. Without printing yet, from the Main tab, click Edit Settings. WordPerfect displays the Edit Settings dialog box (see Figure 6.15, which has a new named setting).

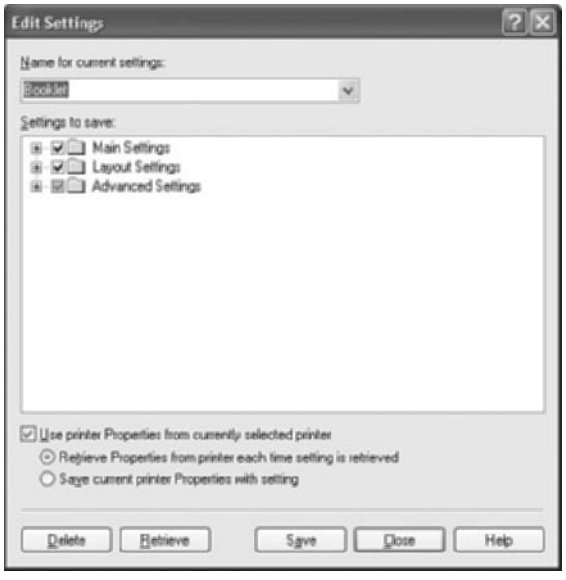


Figure 6.15
You can use the Edit Settings dialog box to save customized print settings for future use.

3. Change the Name for Current Settings (for example, Booklet).
4. You can ignore the Settings to Save list because you have already made the changes you want.
5. Uncheck the Use Printer Properties from [System Default] box at the lower-left corner of the dialog box.
6. Click the Save button.
7. Click Close.

Now whenever you want to print using your named setting, simply access the Print dialog box, select your named setting from the Settings list box (for example, Booklet), and WordPerfect modifies the Print dialog box setup. Click Print to print using the new settings.

TIP FROM

When you make changes to the Print dialog box setup, WordPerfect remembers those settings for that document until you close the document. If you want to restore the default print settings quickly without closing the document, open the Print dialog box, click Edit Settings, choose [Application Default], and then choose Retrieve.

FAXING DOCUMENTS

Printing to paper through a local or network printer is only one method of getting your document out to the world. WordPerfect can also fax your document directly from within WordPerfect to any other location, quickly and painlessly. However, first the following conditions must be met:

- A fax board must be installed in your computer (or connected to your network) and also be connected to a working telephone line. Most modems come with faxing capabilities built in, so if you have a modem, you probably already have the hardware needed to fax. Check your modem manual for more information.
- A Windows-based fax program must be installed on your computer. When fax software is installed, a fax printer appears in your list of available printers. You can check this by clicking the Windows Start button and choosing Printers and Faxes (see Figure 6.16), or by accessing the WordPerfect Print dialog box and clicking the drop-down list under Name. Many modems ship with fax software (check your modem documentation for more information), and Windows XP has a built-in Send Fax Wizard.
- The person to whom you send the fax must have a fax machine or a computer-based fax program and a fax/modem to receive the fax.

Figure 6.16
If you have a fax printer installed in your Windows system, that printer appears along with other printers in the Windows Printers dialog box.

Assuming that the listed conditions are met and the hardware and software are properly set up, follow these steps to fax a document from WordPerfect:

1. With the document that you want to fax in the active window, choose File, Print, or press F5.

2. Choose the fax printer from the Name drop-down list.
3. Make other changes to the print setup as desired (for example, which pages to print).
4. Click Fax to fax the document. WordPerfect then prepares the document for faxing and hands it off to your fax software for faxing.
5. Your fax software should display a dialog box that enables you to designate where to send the fax. If the dialog box doesn't appear, click the fax software icon on the Windows taskbar or press Alt+Tab to toggle to the fax software.
6. Fill in the destination information in the fax program's dialog box, and then send the fax. Figure 6.17 shows a typical screen from the Windows Send Fax Wizard.

Figure 6.17
Fax software "prints" your document to your fax/modem and sends it to the fax/phone you specify. Your Fax dialog box might be different than shown, but it should include most of the same information.

After the document is scheduled for sending, you can use the fax program's software to monitor the fax status, check the fax logs, or even cancel the fax if it hasn't yet been sent.

If the recipient of your fax complains about page breaks appearing in the wrong places, see "Fax Has Bad Page Breaks" in the Troubleshooting section at the end of the chapter.

SENDING DOCUMENTS VIA E-MAIL

If you use an e-mail program, you can send a selected portion of your document in your messages, or send the entire document as an attachment to a message.

To determine whether your mail program has been installed and is integrated with WordPerfect, choose File, Send To. Supported mail programs are listed on the menu, as is a Mail option.

If you want to send the entire file as an e-mail attachment, simply choose Send To, Mail Recipient (or whatever e-mail program you're using). Windows switches you to your mail program, which then adds the document as an attachment and enables you to send a message with the attachment (see Figure 6.18).

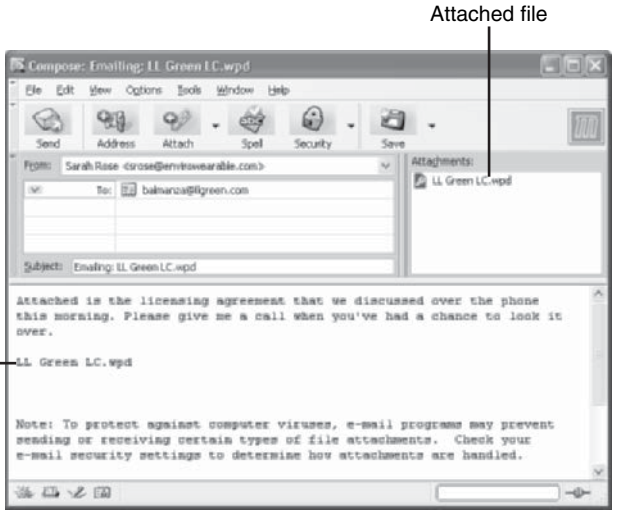


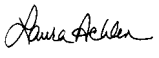
Figure 6.18
If you send your document as an attachment, the receiver can then download the attachment and open it in WordPerfect to preserve all the document's formatting.

You can also send just a portion of the document as part of the body of your message. In WordPerfect, select the text you want to mail, choose File, Send To, and choose Mail. Windows starts your mail program and adds the selected text to the body of the message. You then provide an address, edit the text, and send the message.

If your e-mail program does not appear on the WordPerfect File, Send To menu, you still have these options:

- You can enable your mail program so that WordPerfect recognizes it. You can do this on the Windows Control Panel. Choose the Internet Options icon and, on the Programs tab, specify which mail program should be used.
- You can save your document, open your mail program separately, and then add the document as an attachment.
- You can copy text from a WordPerfect document and paste it in the body of the mail message. Using this method removes most, if not all, of WordPerfect's formatting.

TIP FROM



Don't forget that you can also copy text from WordPerfect and paste it into your mail message, even if your mail program isn't integrated with WordPerfect.

TROUBLESHOOTING

PRINTER ERROR MESSAGES

When I start WordPerfect, and sometimes at other times, I get an error message saying "Unable to access printer" and it tells me to check the status of the printer in the Printers folder. I do that and everything appears to be normal. What does the message mean?

Fortunately, when you see this message, you still can print. It simply means that the WordPerfect printer engine (Print Server 130) might not be loaded properly. However, the next time you try to print, WordPerfect will load it again.

Sometimes, Windows memory gets used up by programs and processes and not enough is left for WordPerfect to load its printer controls. If you open WordPerfect and find only a limited number of fonts available (for example, Courier only), exit WordPerfect and any other programs and restart Windows.

For more information on troubleshooting printing problems in WordPerfect, go to `http://support.corel.com`. Select WordPerfect Office from the Products and Services drop-down list. Type **754014** in the Search Text box and then click Search. Click the link for the Troubleshooting Printing Problems in WordPerfect article.

WHEN NOTHING HAPPENS

I chose Print from the Print dialog box, but nothing happened. What am I doing wrong?

First, make sure your printer is on and online. Usually, if a printer is not available or is offline, you get an error message telling you so. Next, make sure you have selected the proper printer. If you're connected to a network, selecting the wrong printer might send your document to someone else's printer.

Finally, check to see if previous Windows or WordPerfect print jobs are stalled and clogging up the print queue. In WordPerfect, go to File, Print, Status, and in Windows, go to Start, Printers and Faxes, and double-click the printer you want to check. Delete the offending print job, and you then should be able to start a new print job.

BETTER GRAPHICS PRINTING

When I print a document with graphics, the graphic images don't look sharp even though I'm using a laser printer.

The problem might be that you haven't selected the best print settings for your printer. Open the Print dialog box and choose Properties. In the Properties dialog box for your currently selected printer, choose the settings that will give you the best graphics printing, such as print quality, graphics dithering, and so on. Text usually isn't affected by a lower-resolution setting.

GETTING MY ENVELOPES TO PRINT

I know I selected the correct envelope form, but I still can't get my envelopes to come out right.

Sometimes it's *not* your fault! You do have everything set correctly, but the envelopes just won't print in the proper location. Often, you can correct this problem by creating a new envelope definition based on the one that should be working. Choose Format, Page, Page Setup, and in the Page Setup dialog box, follow these steps:

1. Click the form that should be working—for example, Envelope #10.
2. Click the Add button.
3. In the Add New Page Definition dialog box, give the form a unique name.
4. Do *not* change anything else, and make sure that Current Printer Only is selected.
5. Click OK twice to return to your document.

The next time you create an envelope, select this new form. If it still doesn't work, follow the preceding steps and in the Add New Form dialog box, try changing the source, or you can experiment with changing other form options.

FAX HAS BAD PAGE BREAKS

I sent a fax from WordPerfect, but the person I sent it to says page breaks are in the wrong places.

Whenever you change printers, small formatting changes often take place, primarily because the fonts and their horizontal and vertical spacing are slightly different for each printer. Before printing, or in this case faxing, go back through your document and check the layout. When you've verified that it's okay, go ahead and send the document to the fax (printer).

PART II

Formatting Documents

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CHAPTER 7

Formatting Lines and Paragraphs

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by Laura Acklen

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CENTERED AND FLUSH RIGHT TEXT

One of the most common formatting tasks is centering a line. Flush right is a little less common, but it still has an important place, especially in legal documents. In Chapter 3, "Learning Essential Formatting Techniques," you learned how to use justification to center and flush-right lines of text. In this chapter, you'll learn how to use the Center and Flush Right features to align text.

What's the difference, you ask? Let me explain. When you change the justification to Center, every line you create from then on is centered, until you change the justification to something else. This is fine for title pages, where you have multiple lines that you want centered, but it's not the most efficient option for single lines. In this situation, the Center feature is the best choice.

- To center a line of text, press Shift+F7 and then type the text. If you've already typed the text, click at the beginning of the line and then press Shift+F7.
- To make a line of text flush right, or align it against the right margin, press Alt+F7, and then type the text. If you've already typed the text, click at the beginning of the line, and then press Alt+F7.

If you've accidentally pressed Shift+F7 or Alt+F7 in the middle of a line, see "My Title Is Split in Half" in the Troubleshooting section at the end of the chapter.

You can also find Center and Flush Right commands in the menus. Choose Format, Line and note the keyboard shortcuts listed next to the commands.

TIP FROM

Here's something you can't do with justification—you can have centered text and flush right text on the same line. Just press Shift+F7, type the centered text, press Alt+F7, and type the flush-right text.

TIP FROM

If you press Shift+F7 twice, you'll get *dot leaders*, periods with spaces between them, leading to the text. Likewise, if you press Alt+F7 twice, you'll get dot leaders across the line to the text. Change your mind? Press Shift+F7 or Alt+F7 again to remove the dot leaders.

SETTING TABS

Tabs—you either love 'em or you never use 'em. Although they were once the only way to create columns, tabs have fallen out of favor now that we have the Table feature.

Still, tabs have their place, and in some cases, they are easier to set up than a table. For example, if you want to create three columns, one of which is a dollar amount, it's probably faster to turn on the ruler and set two regular tabs and one decimal-align tab than it is to

create a table, format the dollar amount column to decimal alignment, and remove the table lines.

There are four types of tabs:

- **Left Align**—Text flows from the right side of the tab stop. This is the "normal" tab.
- **Center**—Text is centered over the tab stop.
- **Right Align**—Text flows from the left side of the tab stop.
- **Decimal Align**—The numbers are aligned on their decimal points, which rest on the tab stop. You can change the alignment character to something other than a period (decimal point).

Figure 7.1 illustrates the different types of tabs. The Ruler is displayed in the figure so you can see what the different tab markers look like.

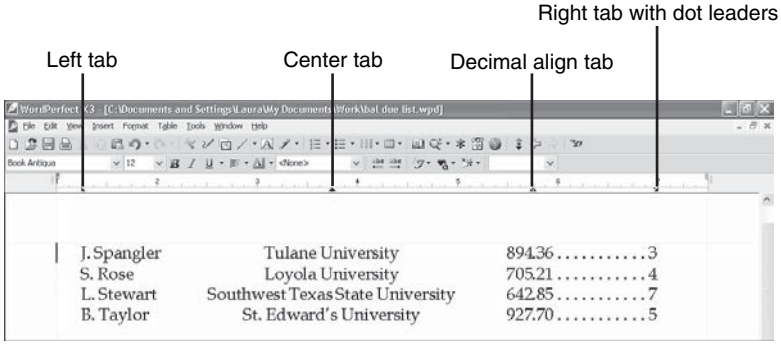


Figure 7.1
The four tab types can be used to align different types of data.

NOTE

> You can add dot leaders to each of the four tab types. Dot leaders are useful when the space between columns is wide because they help the reader's eye travel across the gap. They are especially useful when preparing a table of contents.

If you don't already have the ruler displayed, turn it on by choosing View, Ruler. The default tab settings (every 1/2 inch) are shown with triangles in the tab area of the ruler (see Figure 7.2). The gray area identifies the margin area; the white area is the text area.

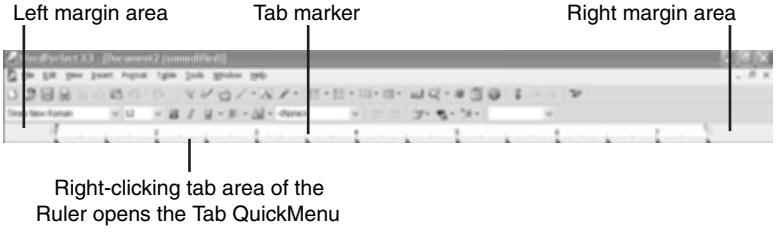


Figure 7.2
Using the Ruler, you can set all types of tabs with just a few mouse clicks.

In most cases, you want to clear the default tabs so that you can create specific tabs. Right-click in the tab area (the small area of white space just above the bottom of the ruler, between tab markers) of the ruler (refer to Figure 7.2) or right-click any tab marker to open the Tab QuickMenu (see Figure 7.3). Choose Clear All Tabs to delete the default tabs.

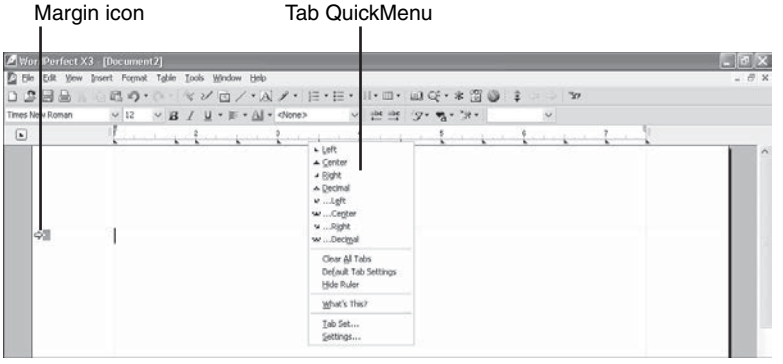


Figure 7.3
Using the Tab QuickMenu, you can clear the default tabs, set specific types of tabs, and then return to the default settings.

CAUTION

> The Indent feature uses the tab settings to indent your text. Changing the default tab settings affects how text is indented. If you plan on indenting text and setting specific tabs in the same document, don't change the tabs at the top of the document. Change them just before you want to type the columnar text. Then, after you've typed the text, restore the default tab settings.

Setting new tabs is easy—just click on the ruler in the tab area where you want the tab stop (this inserts the default tab, which is a left-aligned tab). To remove a tab, drag it off the ruler.

When you set a tab (or modify the default tab settings in any way), a margin icon appears in the left margin area (refer to Figure 7.3). Click the margin icon to display a tab bar, which shows the tab settings for the current paragraph. You can make changes to the tabs on the tab bar using the same methods that you use for the Ruler. Click anywhere in the document to clear the tab bar.

NOTE

> Because the margin icon is located inside the margin area, you might not be able to see it. Try switching to the Page View mode (choose View, Page) or set Zoom to Page Width by clicking the Zoom button and selecting Page Width.

To move a tab, click and drag the tab marker (on the ruler or on the tab bar). When you do, a bubble appears, telling you where the tab will fall when you release the mouse button, and a guideline appears in the text so that you can see the effect on existing text (see Figure 7.4). The mouse pointer changes, too, whenever you point to a tab marker—it changes to a move pointer (that is, a pointer with a box and a box guideline).

To change the tab type, right-click the tab and choose a tab type from the QuickMenu; then, click on the ruler to set the tab. After you've changed the tab type, it stays selected until you select another tab type. So, if you change the tab type to Decimal, every time you click on the ruler, you'll set a decimal tab.

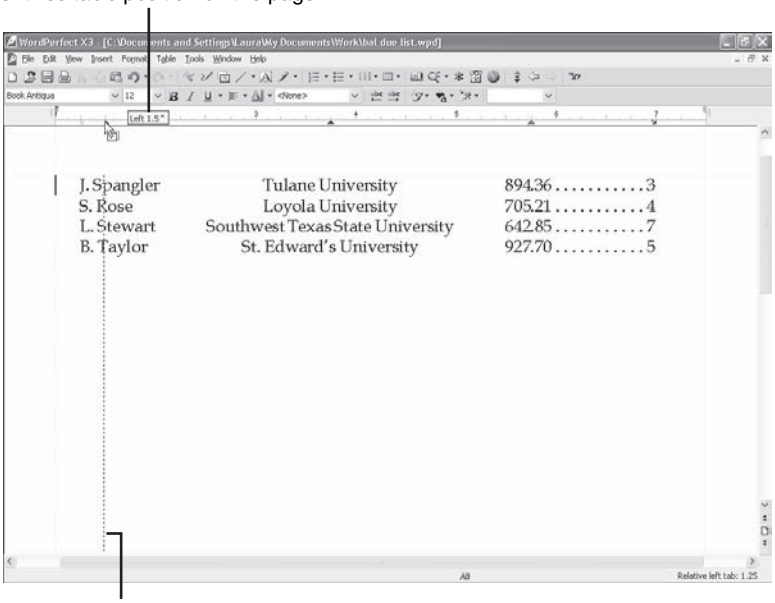


Figure 7.4
If you've already typed the text, you can still move the tabs around. The guideline helps you see where the text will be as you click and drag the tab.

CAUTION

When you're working with tabs, it's extremely important to position the insertion point first. Be sure that you're creating new tab settings exactly where you want them, so they don't reformat the wrong text. Furthermore, when you edit your tab settings to adjust the spacing between columns, be sure you click at the beginning of the text. Otherwise, some of the text is formatted with the original tab settings and the rest of the text is formatted with the new tab settings. It's not a pretty sight, believe me. (Remember your old friend, Undo?)

After you've typed the text, you can go back and edit the tab settings. You can click and drag them on the ruler (or the tab bar) to adjust the spacing between columns. You can even switch to a different tab type if necessary. Just be sure you click at the top of the text that you've formatted with tabs before you start making changes.

When you're ready to return to default tab settings (so you can use regular tabs and indent later on in the document), right-click in the document where you want to make the change and choose Default Tab Settings.

It wouldn't be fair not to mention the Tab Set dialog box (see Figure 7.5). Everything you can do from the ruler and more is available in this dialog box. Right-click the ruler, and then choose Tab Set (refer to Figure 7.3). Or choose Format, Line, Tab Set to display the Tab Set dialog box.

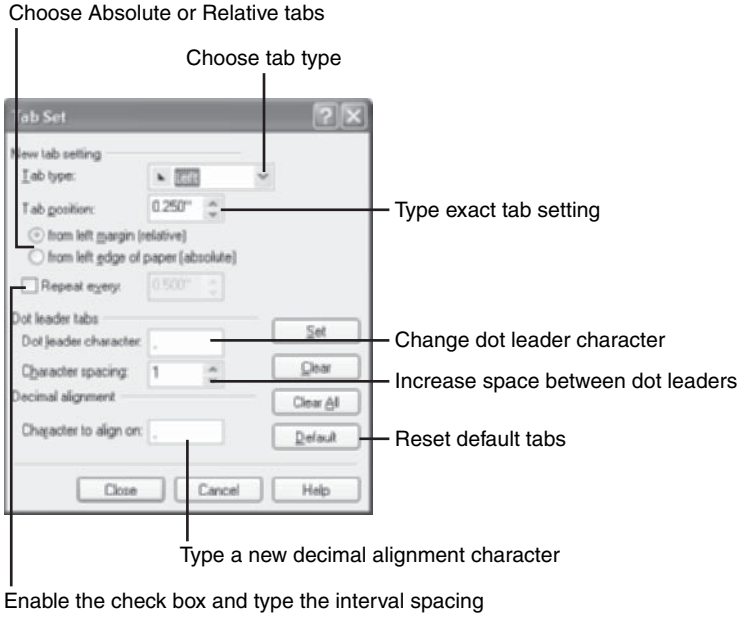


Figure 7.5
The Tab Set dialog box offers options that aren't available when you use the ruler.

TIP FROM

You might be wondering what the difference is between an absolute and a relative tab setting. Absolute tab settings are measured from the left edge of the paper. They stay in the same place no matter what you do to the margins. Relative tabs, on the other hand, move with the margin settings. For example, if you set a tab at 1.5", the actual tab position is the width of the left margin plus the 1.5". Therefore, if the left margin is 1", the actual tab setting is at 2.5". The advantage of relative tabs is that they self-adjust whenever you change the margin settings.

If you press Tab, only to have WordPerfect indent the whole paragraph, see "Pressing Tab Indents the Paragraph" in the Troubleshooting section at the end of this chapter.

INDENTING TEXT

Indentation is often used for quotations, to emphasize text, or to place a paragraph in a subordinate position beneath another paragraph. When you create a bulleted or numbered list,

WordPerfect inserts an Indent command after the bullet or number so that the text you type isn't aligned under the bullet or number, but rather under the first word of the text.

➔ For more information on creating outlines and bulleted or numbered lists, **see** "Working with Bulleted and Numbered Lists," **p. 284**.

There are four ways to indent text:

- Indent moves every line within a paragraph to the next tab setting (to the right). By default, this moves the text over 1/2 inch every time you choose Indent.
- Double Indent moves every line in a paragraph in from the left and right sides, to the next tab setting. By default, this indents the text by 1/2 inch on the left and 1/2 inch on the right.
- Hanging Indent leaves the first line at the left margin—all the other lines are indented (on the left side) by 1/2 inch. Hanging Indent has the opposite effect of Indent.

CAUTION

Here's the annoying thing about the Hanging Indent option. If you've cleared all the tabs, the hanging indent will start the first line at the left edge of the paper, which might or might not work, depending on your printer (you might recall that some printers have an unprintable zone, roughly .25" from the edges of the paper). You'll need to set two tabs: one where the first line should begin and one where the subsequent lines should begin. For example, you might set a tab at 1/2 inch and one at 1 inch for a hanging indent that formats the first line 1/2 inch into the left margin and the subsequent lines at the left margin.

- Back Tab works like Margin Release on a typewriter (yes, there was a time when everyone used typewriters). It temporarily releases the left margin so the first line of a paragraph starts in the left margin area; the other lines align at the left margin.

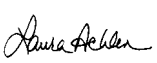
To indent a new paragraph, press F7, and then type the text. Press Shift+Ctrl+F7 for a double indent and Ctrl+F7 for a hanging indent. As usual, if you've already typed the text, click in the paragraph before applying an indent style.

You can choose Indent, Double Indent, and Hanging Indent, as well as Back Tab, from the Paragraph menu. Choose Format, Paragraph to open the Paragraph menu.

TIP FROM

WordPerfect can display symbols for spaces, hard returns, tabs, indent, center, and flush right, as well as a few others. If you want to see these symbols, choose View, Show ¶, or press Ctrl+Shift+F3. You can also choose the symbols that you would rather not have displayed. Choose Tools, Settings, Display and then click the Symbols tab. Deselect the symbols that you don't want to see. Choose OK, and then Close when you are done.

TIP FROM



If the QuickIndent feature is enabled, you can quickly indent paragraphs with the Tab key. When you press Tab at the beginning of the first and second lines, QuickIndent converts those tabs into an indent. You can also quickly create a hanging indent by pressing Tab at the beginning of any line except the first line in a paragraph. Turn QuickIndent on or off by choosing Tools, QuickCorrect. Click the Format As You Go tab, and then enable or disable the check box next to QuickIndent (in the list of Format As You Go choices).

➔ For more information on enabling and disabling the QuickIndent feature, **see** "Customizing Format As You Go," **p. 134**.

If you want the first line of every paragraph to be indented automatically (rather than pressing Tab each time), use the First Line Indent option. Choose Format, Paragraph, Format to open the Paragraph Format dialog box (see Figure 7.6). Type the amount that you want the first line indented in the First Line Indent text box. (A tab indents the first line by 1/2 inch.) Click OK. All new paragraphs from this point on will have the first line indented. Set the value back to 0 (zero) inches for no indent.

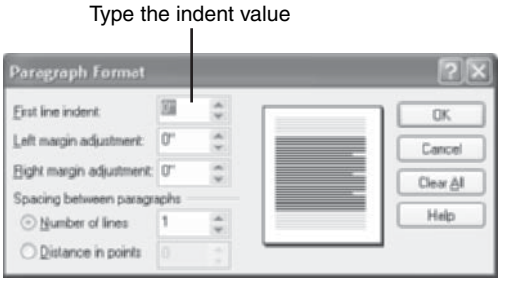


Figure 7.6
Type the value for the first-line indent in increments of inches. For example, 1/4 inch would be .25".

Are you having a hard time sorting paragraphs that have been indented with tabs, indents, or hanging indents? See "Sorting Indented Paragraphs" in the Troubleshooting section at the end of this chapter.

ADJUSTING THE SPACING BETWEEN LINES AND PARAGRAPHS

As you might recall from Chapter 1, "Getting Comfortable with WordPerfect," the default line spacing setting is single-spacing. Some types of documents, such as grants and formal reports, require a certain line-spacing setting. For example, if I'm planning on printing out a document for someone else to review, I'll change to double- or triple-spacing, so that person has room to write comments.

To change line spacing, click where you want the change to take effect (or select the text you want to change). Choose Format, Line, Spacing to open the Line Spacing dialog box (see Figure 7.7). Either type a value or click the spinner arrows to increase or decrease the

value in the Spacing text box. For example, type 1 for single-spacing, 1.5 for one-and-a-half spacing, 2 for double-spacing, and so on.

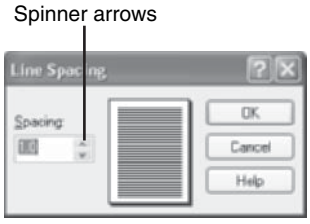


Figure 7.7
You can specify the number of lines that you want between each line by typing the value or clicking the spinner arrows.

The new line-spacing setting takes effect at the beginning of the paragraph where the insertion point is resting, and it remains in effect through the rest of the document, or until you change the line spacing again. In a double-spaced document, for example, it's common to switch to single-spacing for lists or quotations.

NOTE

> The actual amount of space between lines depends on the current font and font size. WordPerfect automatically adjusts the line height to accommodate the tallest character, so if you switch to a line-spacing setting of 1.5 lines, you'll get space equal to one-and-a-half times the height of a line.

The accepted standard is to leave a blank line between paragraphs, so you just press Enter twice after you type a paragraph, right? That's not a problem—until you decide to change the line spacing to double. Now you've got the space of two lines between each paragraph. Furthermore, these extra lines leave space at the top of a page.

Rather than insert extra blank lines, you can adjust the spacing between paragraphs. This way, you always get the same amount of space between each paragraph (no matter what you do to the line spacing), and you don't have extra blank lines floating around. To change the paragraph spacing, click where you want the change to take effect. Choose Format, Paragraph, Format to open the Paragraph Format dialog box (refer to Figure 7.6). In the Spacing Between Paragraphs section, you can enter the number of lines or the number of points that you want between each paragraph. Either type the value or click the spinner arrows to increase or decrease the value.

NOTE

> You might be familiar with the term *points* as it relates to font sizes. An inch is 72 points. You probably won't ever use points as a unit of measure, but, just in case you want to, it's there.

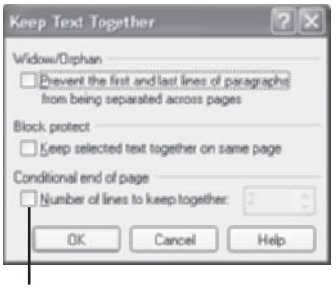
KEEPING TEXT TOGETHER

WordPerfect automatically creates a new page for you as soon as you reach the bottom of the current page. It's so transparent that you probably don't even stop to think about it—that is, until you preview the document and realize that you have headings and paragraphs separated by a page break.

You can prevent these situations by marking the text that should stay together when a page break is encountered. You can use three features to do this: Widow/Orphan Protection, Block Protect, and Conditional End of Page. Choose Format, Keep Text Together to display the Keep Text Together dialog box (see Figure 7.8).

➔ For more information on inserting page breaks, **see** "Inserting Page Breaks," **p. 194**.

Figure 7.8
The three options in the Keep Text Together dialog box are all designed to keep important information from being separated by a page break.



Enable this check box and type the number of lines to keep together

ENABLING WIDOW/ORPHAN PROTECTION

Widow/orphan protection is designed to protect against single lines of a paragraph getting left behind at the bottom of a page or getting pushed to the top of the next page. This improves the document's appearance and makes it easier to read.

The first line of a paragraph that gets left behind at the bottom of a page is called an orphan. A widow is the last line of a paragraph that gets pushed to the top of a page.

Position the insertion point where you want widow/orphan protection to start (usually at the top of the document). In the Keep Text Together dialog box, enable the check box in the Widow/Orphan section.

USING BLOCK PROTECT

You use the block protect feature when you want to keep a section of text together on the same page. As you edit the document, and the block moves near a page break, WordPerfect decides whether the block will fit on the current page. If it doesn't fit, the entire block gets moved to the top of the next page. Block protect works well for keeping figures or tables and explanatory text together. You can also use it to protect numbered paragraphs and other lists.

To turn on block protect, select the text (and figures or tables) that you want to keep together. In the Keep Text Together dialog box, enable the check box in the Block Protect section.

CAUTION

> Block-protecting large sections of text can result in big chunks of white space in the middle of a document. If this situation arises, try to find a logical place for a page break so you can separate the text into smaller chunks.

SETTING A CONDITIONAL END OF PAGE

The Conditional End of Page feature keeps a certain number of lines together when a page break is encountered. You might use Conditional End of Page at the beginning of a heading so you can specify how many lines of the following paragraph you want to keep with the heading.

To turn on Conditional End of Page, position the insertion point at the beginning of the heading. In the Keep Text Together dialog box, choose Number of Lines to Keep Together. In the text box type the number of lines that you want to keep together. Count the heading line as one of the lines, and if there is a blank line between the heading and the paragraph, count that, too.

If you're having trouble getting Conditional End of Page to work for you, see "Conditional End of Page Isn't Working Right" in the Troubleshooting section at the end of this chapter.

INSERTING LINE NUMBERS

Line numbers are used in certain types of documents (such as legal or scientific documents) to give an easy point of reference. For example, you can tell your client to look for a change that was made on "page 13, line 5." Line numbers can also make it easier to proofread and revise many different types of documents.

To turn on line numbering, click in the line (or paragraph) where you want the line numbers to start. Choose Format, Line, Numbering to open the Line Numbering dialog box (see Figure 7.9). Choose Turn Line Numbering On.

After you've turned on line numbers, choose from the following options. Notice that as you make changes to the line numbering options, the sample document is updated to reflect the changes.

- Click the Numbering Method drop-down list arrow and choose a style for the numbers.
- Specify the starting line number, the first printed line number, and the numbering interval. (Regardless of the style that you use for the line numbers, you still set these line number options numerically.)

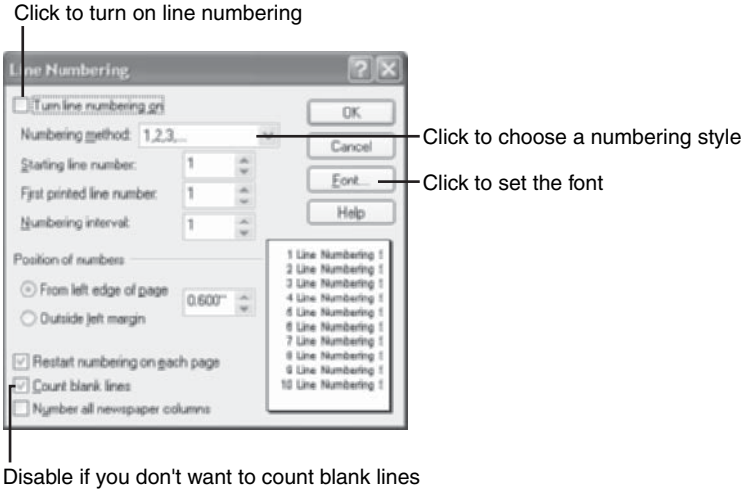


Figure 7.9
In the Line Numbering dialog box, you can turn on line numbers, select a line number style, and specify the position and font for the numbers.

- Change the location of the line numbers by setting the distance between the line numbers and the left edge of the page or the distance between the line numbers and the left margin.
- Deselect Restart Numbering on Each Page if you want the lines numbered consecutively through the end of the document.
- Deselect Count Blank Lines if you don't want to skip blank lines in the line number count.
- Select Number All Newspaper Columns if you want to use line numbers in newspaper columns.
- Click Font to open the Line Numbering Font dialog box. Select the font and the font size. If desired, select a color, shading, or appearance attribute to visually separate the numbers from the body text.

TIP FROM

WordPerfect has a macro that sets up a blank legal pleading paper, with line numbers and a vertical double line that separates the line numbers from the document text (see Figure 7.10). To run the macro, choose Tools, Macro, Play, and then double-click `pleading.wcm`. You can also click the Pleading button on the Legal toolbar to run this macro.

➔ For more information on creating pleading papers with the Pleading Experts, **see** "Using the Pleading Experts," **p. 564**.

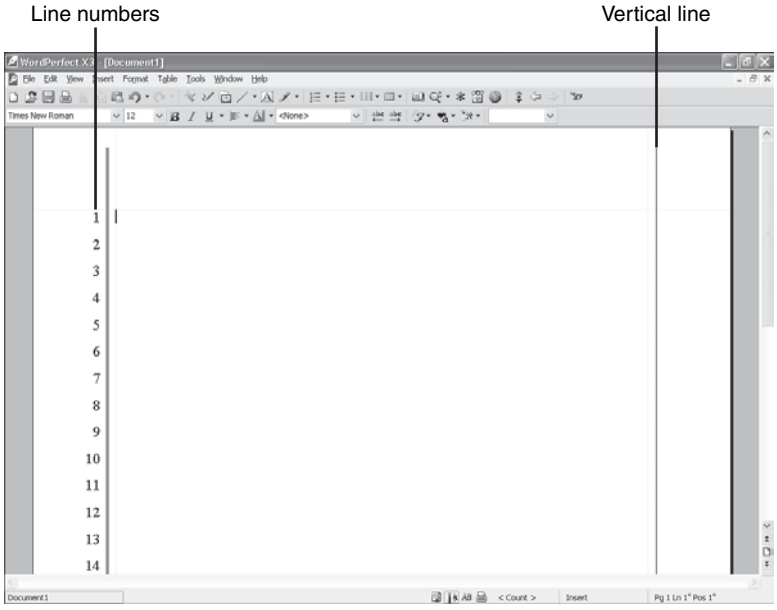


Figure 7.10
The Pleading Paper macro creates a generic legal pleading document.

ADDING BORDERS, DROP SHADOWS, AND FILLS

Strictly speaking, a paragraph is any amount of text followed by a hard return, so a date on a line by itself is treated as a paragraph. You can create a box around any paragraph (or multiple paragraphs) by using the Border feature. A well-chosen border creates a frame around the paragraph, emphasizing it and setting it apart from the rest of the text. You can create a drop shadow behind the box, and you can add a background (fill) to the area inside the border.

NOTE

> You can add borders around a page, a column, or a graphics box. The dialog boxes are virtually identical to the Paragraph Border/Fill dialog box, so rather than repeat this discussion in those respective sections, I'll refer you to this section for information on choosing the border, the drop shadow, and the fill.

ADDING BORDERS

There are 32 different predefined borders from which to choose. Because you can edit these predefined borders to change the color and the line style, there are endless possibilities.

Follow these steps to add a border around a paragraph or selected paragraphs:

1. Click in the paragraph, or select the paragraphs, around which you want to create a border.
2. Choose Format, Paragraph, Border/Fill. The Paragraph Border/Fill dialog box opens (see Figure 7.11).

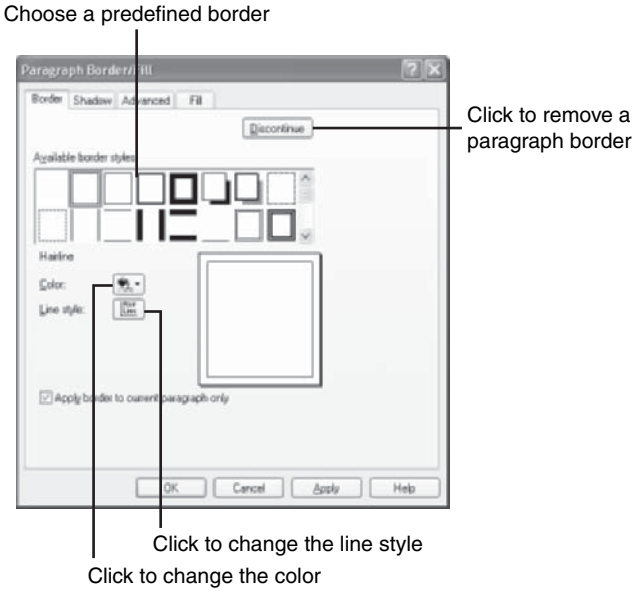


Figure 7.11
In the Paragraph Border/Fill dialog box, you can choose a border, add a drop shadow effect, and choose a fill pattern.

3. Click a border in the Available Border Styles list box. Scroll down through the list to see all the predefined borders. After you've chosen a border, you have the following options:
   - To change the line style used in the border, click the Line Style button and then click a line style from the palette (see Figure 7.12).
   - To change the color of the border, click the Color button and then click a color on the palette.

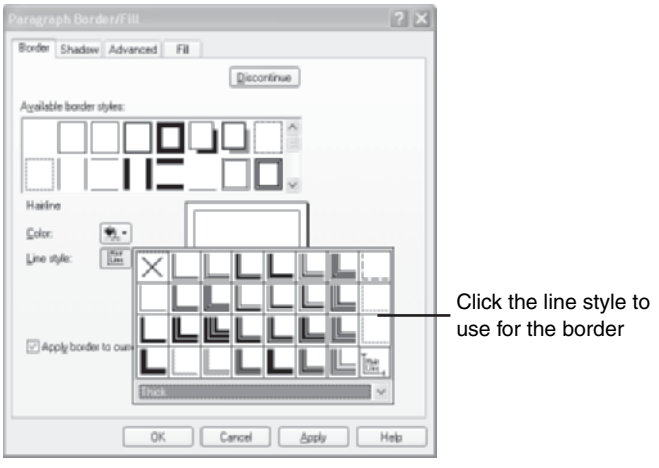


Figure 7.12
You can choose a line style from this palette for the paragraph border.

4. Select Apply Border to Current Paragraph Only if you only want the border applied to the current paragraph or selected paragraphs. Otherwise, the border starts with the current paragraph(s) and stops at the end of the document.

To remove a paragraph border, click in the paragraph, choose Format, Paragraph, Border/Fill to open the Paragraph Border/Fill dialog box, and click the Discontinue button.

TIP FROM

If you want to add graphic borders from other programs to the list of available border styles in the Border/Fill dialog box, you must convert the file to WPG format. Open the file in Presentations, and then save it in the `\Program Files\Wordperfect Office X3\graphics\borders` folder in WPG format.

ADDING DROP SHADOWS

A drop shadow gives your borders a distinctive look by adding depth behind the frame. You might want to use a drop shadow border for special announcements, advertisements, or important sections of a form. A drop shadow also looks great when applied to a page border for letterhead, a title page, or flyer.

Follow these steps to create a drop shadow:

1. Choose Format, Paragraph, Border/Fill, and then click the Shadow tab. There are 25 different drop shadow effects (see Figure 7.13). Click one of the effects to have it applied to the sample document.

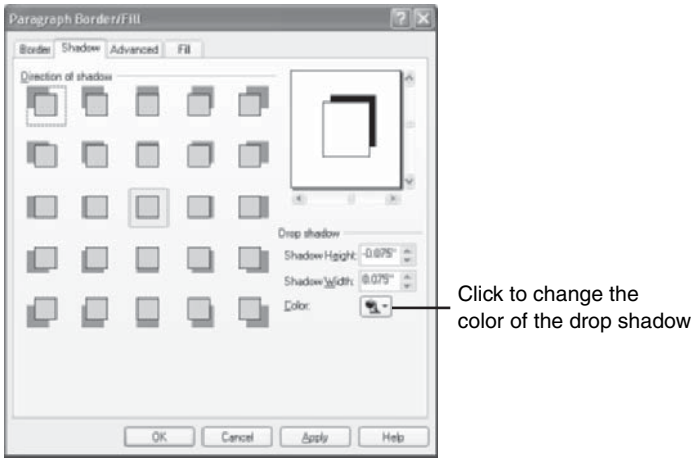


Figure 7.13
You can select one of the shadow effects in the Shadow tab of the Paragraph Border/Fill dialog box.

If you're trying to choose a drop shadow and nothing happens, see "I Can't Choose a Drop Shadow" in the Troubleshooting section of this chapter.

2. (Optional) Enter a value for the height and width of the shadow.

3. (Optional) Click the Color button and select a color for the drop shadow.
4. Choose Apply to apply the drop shadow and leave the Paragraph Border/Fill dialog box open; choose OK to apply the drop shadow and close the dialog box.

CHOOSING FILL PATTERNS

Borders and fills are independent of each other, so you can apply a fill pattern to a paragraph (or selected paragraphs) without choosing a border first. Although the most common use of fill is to add shading, you can have some fun combining patterns with foreground and background colors.

Here's how to add a fill pattern:

1. Click in the paragraph, or select the paragraphs to which you want to add the fill pattern.
2. Choose Format, Paragraph, Border/Fill, and then click the Fill tab. There are 32 different predefined fill patterns from which to choose.
3. Click a fill pattern to apply it to the sample document. The name of that fill pattern appears under the Available Fill Styles list box (see Figure 7.14).

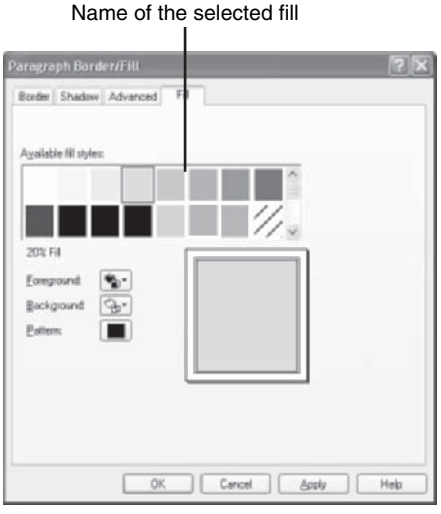


Figure 7.14
After you've selected a fill pattern, you can add color to it by selecting another foreground and/or background color.

4. After you've selected a fill pattern, you can
   - Click the Foreground button and choose a color for the foreground.
   - Click the Background button and choose a color for the background.
   - Click the Pattern button and choose another fill pattern.

Choose Apply to apply the fill pattern to the paragraph(s) and leave the Paragraph Border/Fill dialog box open; choose OK to apply the fill pattern and close the dialog box.

INSERTING DROP CAPS

A drop cap is the first letter in a paragraph, enlarged and positioned so that the top of the letter lines up with the top of the first sentence. The rest of the letter drops down into the text, hence the term "drop cap." Drop caps are used to draw the reader's eye to a specific point in the page, such as to a pull quote or to the beginning of a chapter or section.

To add a drop cap at the beginning of a paragraph, click in the paragraph, and then choose Format, Paragraph, Drop Cap or click the Drop-Cap Style button to open the Drop Cap dialog box. Select one of the drop cap styles—WordPerfect grabs the first character, enlarges it, and formats the rest of the paragraph around it (see Figure 7.15).

TIP FROM

The Drop-Cap Style button has a "picker" (the arrow next to the button) that you can click to open a palette of drop-cap styles. Hover over each of the styles to see a Real-Time Preview of how the paragraph will look with the style applied.

TIP FROM

You can insert a drop cap character, with the default Drop Cap in Text style, at the beginning of a paragraph by pressing Ctrl+Shift+C.

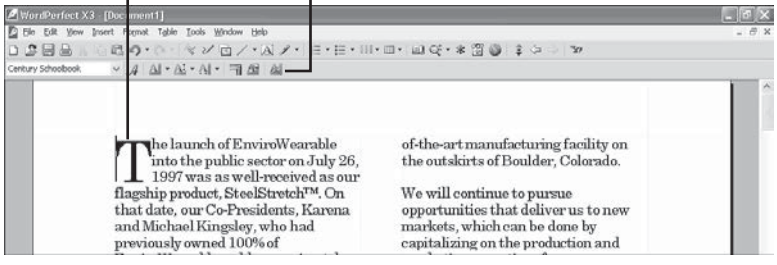


Figure 7.15
You can use a drop cap to decorate the beginning of a page, chapter, or column.

After you've created a drop cap character, click in front of the drop cap to display the Drop Cap property bar with the following buttons:

- Click Drop Cap Font button to choose a font, color, shading, or font attribute for the drop cap.

- Click the Drop Cap Style button to choose a different drop cap style from the palette.

- Click the Drop Cap Size button to choose how tall you want the drop cap to be (in lines). The default is three lines high.

- Click the Drop Cap Position button to place the drop cap in the text or in the margin.

- Click the Drop Cap Border/Fill button to choose a border, drop shadow, or fill pattern.

- Click the Drop Cap Options button to choose how many letters you want in the drop cap. You can choose to have the first word made into a drop cap. You can also choose to adjust for diacriticals and descenders.

- Click the No Drop Cap button to remove a drop cap from the current paragraph.

NOTE

> To switch from the Drop Cap Property Bar to the regular Property Bar, click in the body text.

TROUBLESHOOTING

MY TITLE IS SPLIT IN HALF

I accidentally pressed Shift+F7 in the middle of a title and now the title is split in half. How can I fix this?

If you accidentally press Shift+F7 or Alt+F7 in the middle of a line, strange things can happen! If the line is short, it just splits the text up, but in a paragraph, it can cause the letters to get all crunched together. If you notice this problem right away, press Backspace to delete the Center or Flush Right code. Next, press Home to move to the beginning of the line so you can try again. If you notice this problem minutes later, turn on Reveal Codes (Alt+F3), click at the beginning of that line, and start looking for the code. When you find it, click and drag it out of the Reveal Codes window to delete it.

PRESSING TAB INDENTS THE PARAGRAPH

When I press Tab, the whole paragraph is indented. I want to indent just the first line, not the entire paragraph.

To indent only the first line of a paragraph, press Tab at the beginning of the first line. If you then press Tab at the beginning of any other line in the paragraph, QuickIndent converts the tab to an indent, which indents the whole paragraph.

Pressing Tab at the beginning of any line in a paragraph except the first line creates a hanging indent. In this case, only the first line of the paragraph is lined up against the left margin, and the remaining lines are indented to the next tab stop (1/2 inch).

To turn off the QuickIndent feature, choose Tools, QuickCorrect. Click the Format As You Go tab, and then deselect QuickIndent.

SORTING INDENTED PARAGRAPHS

After painstakingly creating a list of contributors for a fundraising campaign, I can't get the list to sort correctly. I indented each entry so it would be formatted underneath some other text. What am I doing wrong?

You aren't doing anything wrong—tab and indent codes act as field delimiters in a sort. In other words, they count as fields, moving the first field (the first word) over to the second or third field. In the case of a hanging indent, there are two codes inserted—left indent and back tab—so the first word in the line is actually the third field. The same thing happens if you have flush right, center, and margin release codes at the beginning of a line.

The best thing to do is turn on Reveal Codes and figure out how many codes you have at the beginning of each line. Then, adjust the field number in your sort to skip past the codes.

CONDITIONAL END OF PAGE ISN'T WORKING RIGHT

I've used Conditional End of Page to keep the first three lines of a paragraph with a heading, but it isn't working. Only the first line stays with the heading. What am I doing wrong?

First, be sure you click at the beginning of the heading line before you insert the Conditional End of Page code. Second, when you specify how many lines to keep together, be sure that you count the heading as a line. Furthermore, if there is a blank line between the heading and the paragraph, you have to count that, too. So if you have a heading, a blank line, and then the paragraph, and you want to keep three lines of the paragraph together with the heading, you need to keep five lines together.

I CAN'T CHOOSE A DROP SHADOW

I'm in the Shadow tab in the Paragraph Border/Fill dialog box, but whenever I click a drop shadow effect, nothing happens. The sample document doesn't show me the drop shadow effect and nothing is inserted in my document when I click OK.

You probably forgot to choose a border style first. If you don't choose a border in the Available Border Styles list box, the options in the Shadow tab won't have any effect because they manipulate the borders. The Fill tab still works, without a border selected, because you can add fill to a paragraph without adding a border.

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CHAPTER 8

FORMATTING THE PAGE

In this chapter

by Laura Acklen

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CHANGING MARGINS

Believe it or not, you can make your document easier to read by adjusting the margins. A wider margin creates more whitespace around the text and reduces the number of words on a line. The shorter the lines, the less likely the reader is to lose his or her place.

On the other hand, if you're trying to reduce the number of pages, you can make the margins smaller so that you can fit more on a page. When you use headers and footers, for example, you might want to set the top and bottom margins to 1/2 inch.

In Chapter 1, "Getting Comfortable with WordPerfect," you learned how to change the margins by clicking and dragging the guidelines. Some people have trouble clicking and dragging these guidelines, so they prefer to use the dialog box, where they can type in the margin settings directly.

To change the margins in a dialog box, choose Format, Margins, or press Ctrl+F8 to open the Page Setup dialog box (see Figure 8.1). You can also choose File, Page Setup. Type the margin settings in the text boxes, or click the spinner arrows to increment/decrement the values.

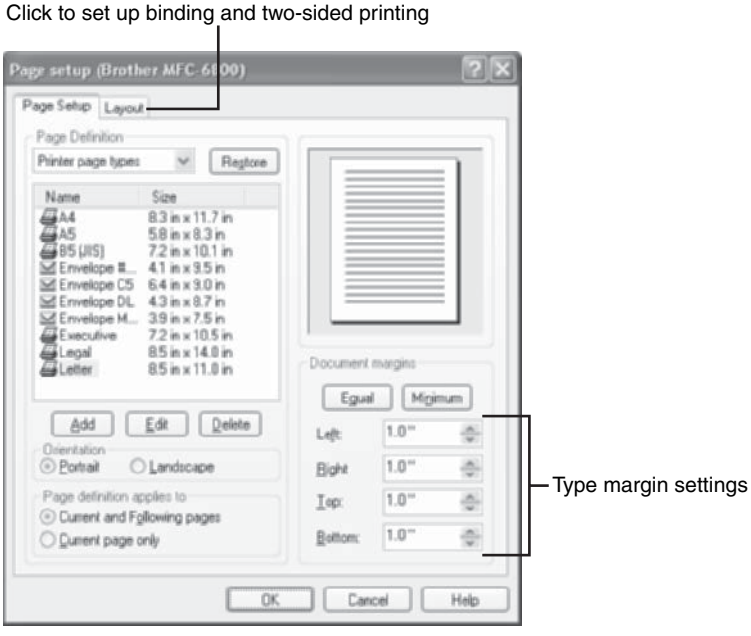


Figure 8.1
The Page Setup dialog box has options for setting and adjusting the margins.

If you want to set equal margins on all sides, type the margin setting in one of the four text boxes, and then click the Equal button. Click the Minimum button to set the margins according to the minimum margin requirements for the currently selected printer.

By default, the new margin settings take effect on the current and following pages. Choose Current Page Only in the Page Definition Applies To section to apply the margin change differently.

If you've been trying unsuccessfully to adjust the top and bottom margins to center text on a page, see "Can't Find the Right Margins to Center the Page" in the Troubleshooting section at the end of this chapter.

If you notice that margins are changing in the middle of a document and you can't find any margin codes to delete, see "I Have Gremlins Formatting My Document" in the Troubleshooting section at the end of this chapter.

NOTE

If you need to shift the margins to accommodate book or booklet binding (so the words aren't covered up by the binding), you can set a binding width that functions independently of the margin settings. Click the Layout tab in the Page Setup dialog box. Type the amount of margin space that the binding will require, and then choose Left, Right, Top, or Bottom, depending on where the binding will be placed. To set up alternating pages, place a check mark in the Alternating check box. The sample document in the dialog box shows what the bound pages will look like with the settings you have made. To set the binding for double-sided documents, choose Book or Tablet in the Two-sided printing section, and then choose to increase the binding width on the inside margin or the outside margin (these two options aren't available if Off is chosen).

TIP FROM

WordPerfect's default margins of 1 inch on all sides might be fine for most folks, but if you prefer to use different margins in your documents, you can alter the settings in the default template. This way, you don't have to set new margins every time you create a new document.

➔ To change the settings in the default template, **see** "Editing the Default Template," **p. 478**.

TIP FROM

Headers, footers, footnotes, endnotes, and watermarks use the margin settings in the document style, not the margin settings that you insert in the document. If you have these elements in your document, be sure you change the margins in the DocumentStyle, or you'll have mismatched margins. To edit the document style, choose View, Reveal Codes to turn on Reveal Codes. Double-click the Open Style: DocumentStyle code (at the very top of the document), and then choose Format, Margins from the Styles Editor dialog box to open the Page Setup dialog box, where you can set the margins.

INSERTING PAGE BREAKS

No doubt you've noticed that WordPerfect automatically creates a new page for you whenever you fill up the current one. It's transparent, so you don't even have to think about it. For those times when you want to start a new page and you haven't reached the bottom of the current page, you can insert a page break, which is also known as a hard page. Soft page breaks are inserted by WordPerfect as you type; hard page breaks are those that you insert.

To insert a hard page, press Ctrl+Enter. In Draft View mode, a page break displays as a horizontal double line. In Page View mode, you see a space between the two pages (see Figure 8.2).

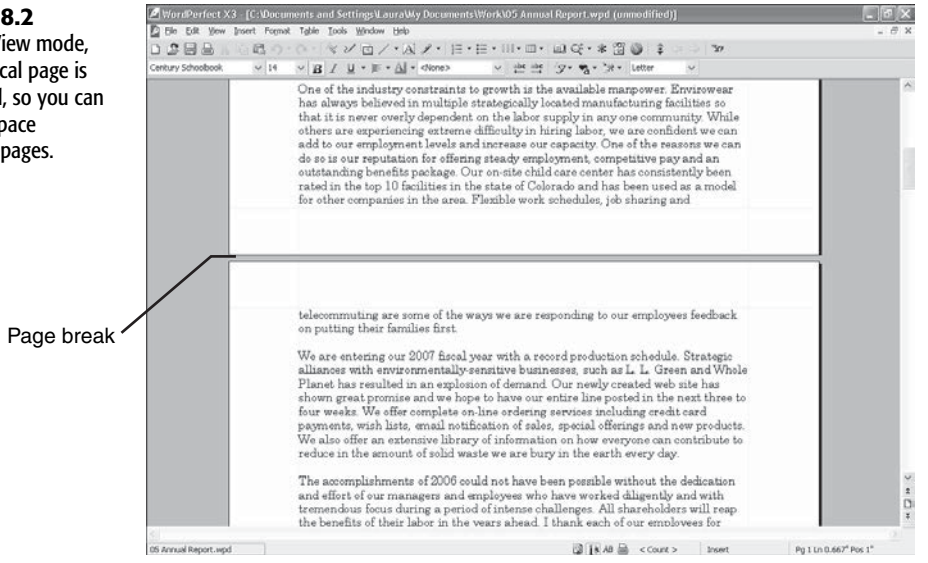


Figure 8.2
In Page View mode, the physical page is displayed, so you can see the space between pages.

When you insert a page break, a hard page code [HPg] is inserted in the document. To remove a page break, delete the [HPg] code. You can also click at the end of the paragraph, just before a page break, and press Delete. In a style-heavy document, however, you might inadvertently delete a style code with this method. If this happens, choose Undo until things are back to normal or reapply the style.

In a long document, you might decide to precede a major section with a hard page break so that each section begins on a new page. If, during heavy revisions, these hard pages get moved around to the wrong places, use Find and Replace to quickly strip out all the hard page codes (or only the ones that you don't need anymore).

➔ For more information on the features that keep text together around page breaks, **see** "Keeping Text Together," **p. 180**.

➔ To get a refresher on how to search for a code and delete it from the document, **see** "Searching for Codes," **p. 128**.

TIP FROM

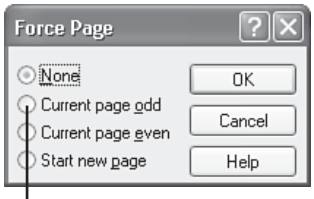
A hard page break is not the best tool to use if you are trying to keep headings at the top of a page, or if you want to push a few lines of text down to the next page. There are other features that are geared to positioning headings at the top of the next page and for keeping text together. They are grouped together in the Keep Text Together dialog box (choose Format, Keep Text Together).

TIP FROM

In the Reveal Codes window, if the red cursor is to the left of a code, press Delete; if the red cursor is to the right of a code, press Backspace. You can also click and drag a code out of the Reveal Codes window to delete it.

When you're printing on both sides of the paper, you'll want to start new chapters or sections on the right side of facing pages. The simplest way to do this is to use the Force Page feature. First, click in the paragraph where you want to force a new page.

Choose Format, Page, Force Page to open the Force Page dialog box (see Figure 8.3). Choose Current Page Odd to force a new odd-numbered page. (Pick this if you want to start new chapters and sections on the right side.) Choose Current Page Even to force a new even-numbered page. Choose Start New Page to create a new page at the beginning of the current paragraph.



Click to start chapters on the right side

Figure 8.3
As with hard page breaks, if further editing moves the new page to an undesirable location, you can turn on Reveal Codes and delete the [Force] code.

ADDING PAGE NUMBERS

Numbering pages in WordPerfect can be as simple as printing a page number at the bottom of every page or as complex as numbering chapters individually and choosing different page-numbering styles for various sections of a document. This section follows a logical progression of starting with the simple methods and progressing to the more complicated methods.

INSERTING PAGE NUMBERS AT THE TOP OR BOTTOM OF THE PAGE

You can choose from 10 preset page number positions that place the page number at the top or bottom of the page. If you're printing on both sides of the paper, you might want to place the page numbers at alternating top or bottom corners.

Follow these steps to insert a page number:

1. Click on the page where you want the numbering to start.
2. Choose Format, Page, Numbering to display the Select Page Numbering Format dialog box.
3. Click the Position drop-down list arrow to open the list of positions that you can choose from (see Figure 8.4).
4. Select a page number position from the list.
5. Choose OK to insert the page number.

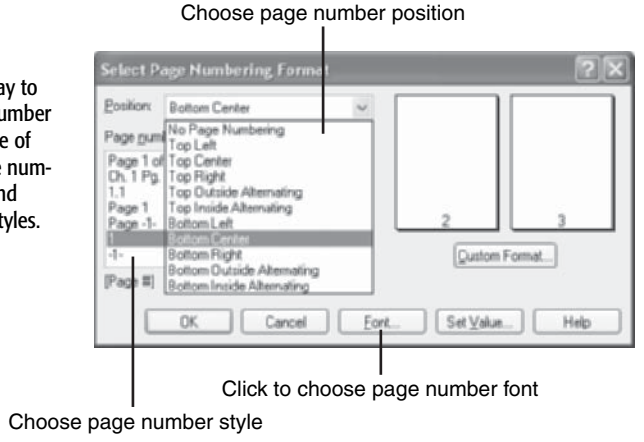
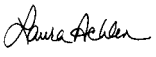


Figure 8.4
The quickest way to insert a page number is to choose one of the preset page number positions and page number styles.

TIP FROM



Page numbers are printed on the top or bottom line in the text area of the page, not in the margin space. WordPerfect inserts a blank line to separate the page number from the rest of the document text. This reduces the amount of text that would normally fit on the page by two lines. If you decrease your top or bottom margin (depending on where you put the page numbers) to approximately 2/3 inch, you can regain the lost space, and the page numbers will appear to print in the margin space.

At this point, you can click OK to insert a basic page number that starts on the current page (as page 1) and continues through the rest of the document. Figure 8.5 shows a document with simple page numbers at the bottom center of the page.

There are other page-numbering options you can choose:

- You can choose a page number format from the Page Numbering Format list box. Scroll down through the list to see the letter and Roman numeral styles.
- You can click the Font button to open the Page Numbering Font dialog box, where you can choose a font, font size, color, or attributes for the page number.

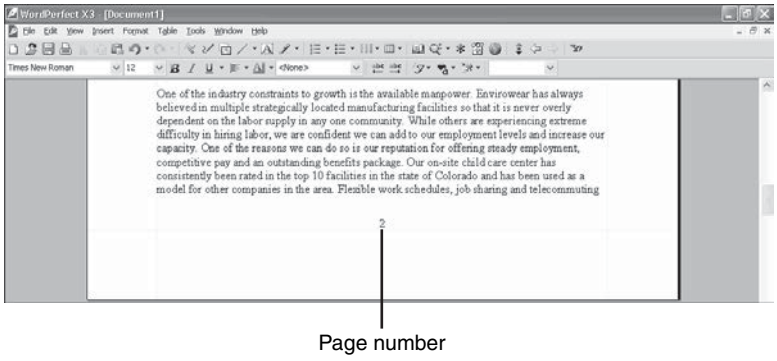


Figure 8.5
The most common page-numbering scheme is to position the number at the bottom center of every page.

TIP FROM

A "page x of y" page number tells you the number of the current page (x) and the total number of pages in the document (y). To create a "page x of y" page number, select Page 1 of 1 in the Page Numbering Format list box. Click OK. You may notice that the page number formats are dynamic, so they reflect the page number where the insertion point is located and the total number of pages in the document. Thus this option will only show Page 1 of 1 if the document is only one page long and the insertion point is on the first page.

CAUTION

WordPerfect uses the font set in the Document Default Font dialog box for page numbers, which might not match the font that you have set in the document. Either set the font that you want for the body text and the page number in the Document Default Font dialog box (by choosing File, Document, Default Font) or choose a font in the Page Numbering Font dialog box that matches the one you've used in the document.

- You can choose Custom Format to open the Custom Page Numbering dialog box. From here, you can create a combination page number style that can include the volume number, chapter number, or secondary page number. You can also create a customized "page x of y" page number style. See the section "Switching to a Different Page-Numbering Scheme" later in this chapter for more information.
- You can choose Set Value to open the Values dialog box, where you can type the new number to use for any of the page numbering components. This is where you reset page numbering by setting the page number back to 1. See the section "Setting Page, Chapter, and Volume Numbers" later in this chapter for more information.

TIP FROM

It's common practice to use different numbering styles for the introductory pages, the body of the document, and the closing sections. To accomplish this, select the format for the page numbers at the top of the document, again at the main body, and then again at the closing section. In addition to switching to a different number format, you should restart the page numbering. See the section "Setting Page, Chapter, and Volume Numbers" later in this chapter for more information on restarting page numbers.

SWITCHING TO A DIFFERENT PAGE-NUMBERING SCHEME

To accommodate long or complex documents, WordPerfect has five types of page numbers that can be used individually or in combination with one another:

- **Page and secondary page numbers that increase automatically**—Journals and newsletters sometimes use the secondary page numbers in addition to the regular page numbers. One set numbers every page consecutively throughout the year, and the other numbers the pages in the individual issues.
- **Chapter and volume numbers that you increase or decrease where appropriate**—Chapter numbers are used for different sections in a document; volume numbers are used to number multiple documents. You could also use these with journals and newsletters to provide volume (year) and chapter (issue/month) numbers.
- **A total pages number that displays the total number of pages currently in the document**—You use this page number in conjunction with the regular page number to create "page x of y" page numbers.

To create a custom page-numbering scheme, move the insertion point to the page where you want the page numbering to start, and then follow these steps:

1. Choose Format, Page, Numbering, Custom Format to open the Custom Page Numbering dialog box (see Figure 8.6).
2. Click a number style in the list box of the page number type that you want to use. For example, to select volume numbering with lowercase Roman numerals, click the fourth item in the Volume list box (see Figure 8.6).

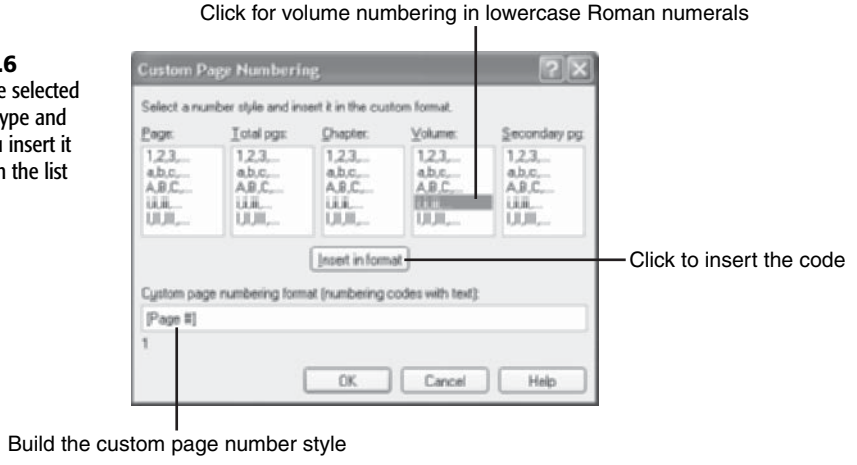


Figure 8.6
After you've selected a number type and format, you insert it as a code in the list box.

3. Click Insert in Format to insert that number style in the Custom Page Numbering Format (Numbering Codes with Text) text box.
4. If necessary, type the text that you want to appear before or after the number. For example, type Volume in front of the [Vol #] code.

5. To create a combination page number, insert the other code in the list box and type the necessary accompanying text. One example of the resulting page number appears below the text box (see Figure 8.7).

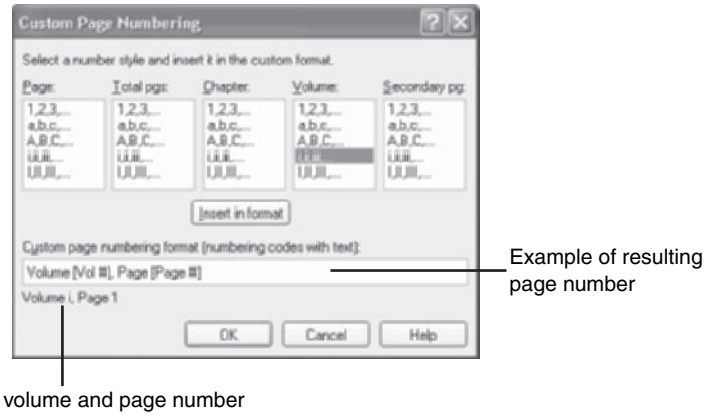


Figure 8.7
The more complex the document, the more important it is to have accurate and descriptive page numbering.

6. When you're satisfied with the way the page number looks, click OK to return to the Select Page Numbering Format dialog box.
7. Make any necessary adjustments to the font or the placement, and then click OK to insert the page number in the document.

If you've just made some adjustments to your custom page numbers and the changes are affecting some of the pages but not others, see "Editing a Custom Page Number" in the Troubleshooting section at the end of this chapter.

SETTING PAGE, CHAPTER, AND VOLUME NUMBERS

Documents with introductory materials often have two sets of page numbers—one for the introductory pages and another for the body text. One common type of formatting uses lowercase Roman numerals (for example, i, ii, iii) for the table of contents and other introductory material, and then Arabic numbers (for example, 1, 2, 3) for the text.

Whether or not you change the format for the page numbers, it's common practice to restart page numbering after the introductory pages. Furthermore, WordPerfect doesn't automatically increment chapter and volume numbers so you have to do that manually.

To change the page number beginning on the current page, follow these steps:

1. In the Select Page Numbering Format dialog box, click the Set Value button to open the Values dialog box (see Figure 8.8).
2. If necessary, click the Chapter, Volume, or Secondary tab. Although the options are identical in every tab, the values on each are tied to the corresponding page number codes in your document.
3. Type the new number in the Set Page Number text box (or click the spinner arrows).

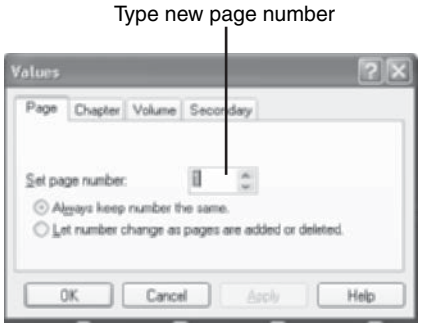


Figure 8.8
You can set the starting value for page numbers, chapter numbers, and volume numbers in the Values dialog box.

4. Choose one of the following:
   - **Always Keep Number the Same**—Use this option when you don't want the page number to change, no matter how much editing takes place. For example, you might want the first page of the body text to be numbered as page 1, no matter how many introductory pages there are.
   - **Let Number Change As Pages Are Added or Deleted**—Choose this option when you want the page number to be updated as you edit the document.
   - If you want the freedom to rearrange chapters, be sure you choose Let Number Change As Pages Are Added or Deleted when you set the chapter number.

INSERTING PAGE NUMBERS ELSEWHERE IN A DOCUMENT

You're not limited to the 10 predefined page number positions. You can insert a page number anywhere in the document. For example, you might want to refer to the current page, chapter, or volume number within the text. Or, you might want to insert a chapter or volume number directly into a title.

To insert a page number elsewhere in a document, follow these steps:

1. Position the insertion point where you want the page number to appear.
2. Choose Format, Page, Insert Page Number. The Insert Page Number dialog box has options for inserting primary and secondary page numbers, chapter and volume numbers, and the total pages number (see Figure 8.9).

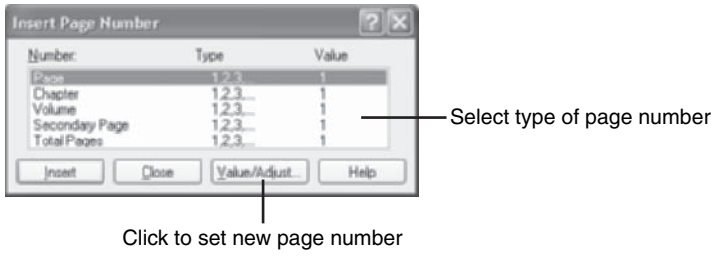


Figure 8.9
You can use the Insert Page Number dialog box to insert a page number in a location other than the predefined page number positions.

3. Click the type of number that you want to insert in the list box.
4. If necessary, click the Value/Adjust button to open the Values dialog box, where you can change to a different page number method (numbers, letters, or Roman numerals) or set the page number. Click Apply and then OK when you're finished.
5. Click Insert (in the Insert Page Number dialog box). The number is inserted at the insertion point.
6. You can continue inserting numbers. Click in the document window and reposition the insertion point, and then click in the dialog box to make it active again. Choose another number type, and then click Insert.
7. Click Close when you're finished inserting page numbers.

TIP FROM

When you're working with headers and footers, you can use the Page Numbering button on the Header/Footer property bar to open a drop-down list of numbering types (page, secondary, chapter, volume, total pages).

If you have page numbers cropping up for no apparent reason, see "I Have Gremlins Formatting My Document" in the Troubleshooting section at the end of this chapter.

CHOOSING DIFFERENT PAPER SIZES

The default paper size in the U.S. version of WordPerfect is 8 1/2 inches by 11 inches (other countries have different standards for paper size). The text is formatted in portrait orientation, which means the paper is taller than it is wide. If all you ever do is create standard business documents, you might never have to change the paper size. However, when the time comes that you have to create an envelope, print on legal-size paper, or rotate a document to landscape orientation, you do so by choosing a different paper size.

Choose Format, Page, Page Setup (or choose File, Page Setup). If necessary, click the Page Setup tab to display the paper sizes that are available for the current printer (see Figure 8.10).

If all you want to do is rotate your text into a landscape orientation (where the page is wider than it is tall), choose Landscape. Select Current Page Only if you want to change the paper size only for the current page, or Current and Following Pages to apply the change to the current page and the rest of the document.

If your document inexplicably prints on two different types of paper, see "I Have Gremlins Formatting My Document" in the Troubleshooting section at the end of this chapter.

Every printer has a list of paper sizes that it can handle. If you switch to a different printer, or computer, the paper size you chose might not be available. When this happens, WordPerfect makes a best guess and selects a similar paper size. If this doesn't work, you have to edit an existing paper size or create your own.

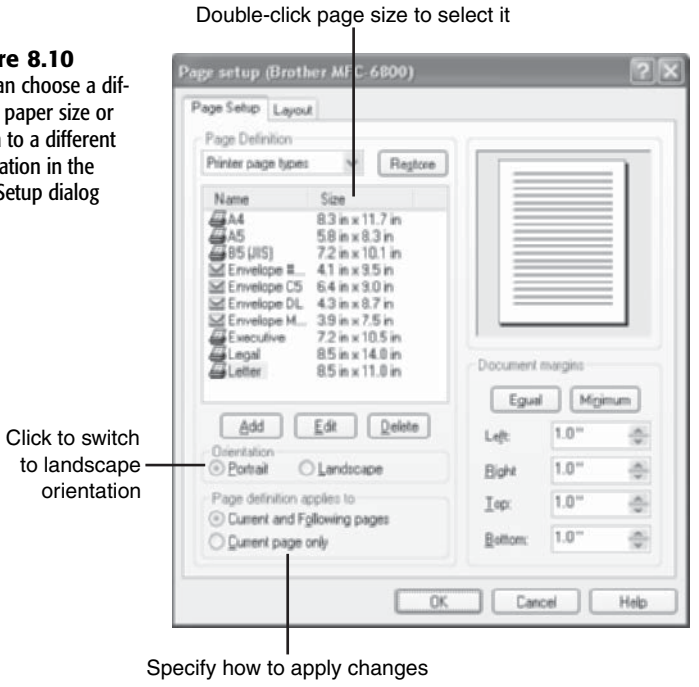


Figure 8.10
You can choose a different paper size or switch to a different orientation in the Page Setup dialog box.

When you create your own custom paper sizes, you're restricted by the limitations of the printer. In other words, you aren't able to create a paper size that doesn't work with that printer.

It's faster to edit an existing paper size than to create one from scratch, so look for a size in the list that's similar to the size you want to create. Select it in the list, and then click the Edit button. The Edit Page Definition dialog box appears (see Figure 8.11).

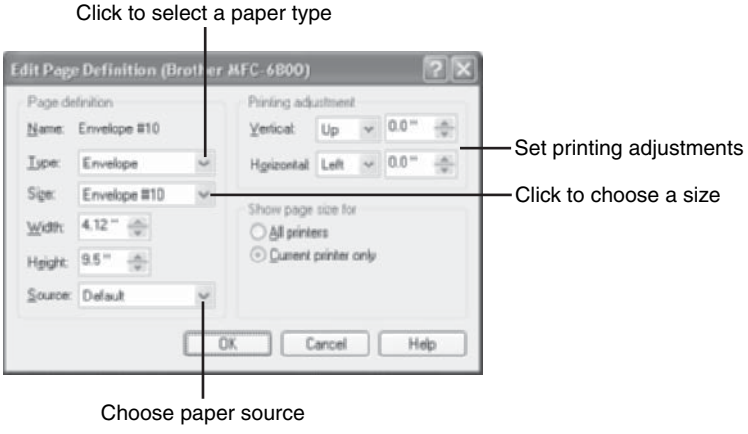


Figure 8.11
You can edit an existing paper size in the Edit Page Definition dialog box.

To create a definition from scratch, click the Add button to display the Add New Page Definition dialog box, which is virtually identical to the Edit Page Definition dialog box except that all the options are available. Now you can work with the following options:

- If you're creating a new definition, type a name in the Name text box.
- You can click the Type drop-down list arrow and choose a paper type from the list.
- You can click the Size drop-down list arrow and choose a paper size from the list. If you don't see the size you need, choose User Defined Size.
- If you chose User Defined Size, enter the page width in the Width text box and the page height in the Height text box. Or, you can click the spinner arrows to increase or decrease the size.
- You can click the Source drop-down list arrow and choose a source for the paper. For example, unless you have an envelope tray attached to your printer, you need to choose Envelope manual feed so you can insert the envelopes manually.
- If for some reason the text doesn't print using the margins you have set, you can reposition the text on the page with printing adjustments. Click the Vertical drop-down list arrow, choose Up or Down, and then type the amount of adjustment in the text box. Or, click the Horizontal drop-down list arrow, choose Left or Right, and then type the amount of adjustment in the text box.

Click OK when you're finished making your changes. The new paper size appears in the Page Definition list box.

CAUTION

Remember that the new definition you've created or the definition that you've edited is not available if you choose another printer. When you switch to a different printer, WordPerfect makes a best-guess match to the paper sizes available on *that* printer. You can, however, create and edit the definitions on that printer to match the definitions on the first printer.

TIP FROM

When you're printing a long letter, usually the first page is on letterhead and the remaining pages are on plainer "second sheets." If you have two paper trays on your printer, you can put letterhead in one and second sheets in the other. The trick is to tell the printer where to get the paper. By creating a separate page definition for the letterhead, you can specify where your letterhead paper is. Then you insert a paper size code for the letterhead on the first page and a paper size code for the second sheets on the second page.

You can delete unused paper sizes by selecting them in the list and clicking the Delete button. Keep in mind that the next time you open a document with that paper size, it won't be available and WordPerfect will make a best-guess match from the other sizes.

If you accidentally delete the wrong paper size, you can restore it from the current printer driver. In the Page Setup dialog box, click the Restore button. Note that if you have Standard Page Types selected in the Page Definition drop-down list, only the Windows standard options are restored.

TIP FROM

If you routinely use a paper size other than the default 8 1/2 inches by 11 inches, you can replace the default paper size in the default (`wp13us.wpt`) template.

➔ For more information on creating and editing templates, **see** "Editing the Default Template," **p. 478**.

SUBDIVIDING PAGES

A single, physical page can be divided into separate, logical pages. A physical page maintains the original dimensions of the paper. Logical pages are pieces of the physical page, but they are still considered individual pages for purposes of page numbering. For example, if you subdivide a page into six logical pages and then turn on page numbering, the logical pages are numbered 1 through 6. The Labels feature uses the same concept to separate a sheet of paper into individual labels.

To subdivide a page, choose File, Page Setup or choose Format, Margins. Click the Layout tab, and then take a look at the Divide Page section (see Figure 8.12). Choose the number of columns and rows by either typing in the number or clicking the spinner arrows. The sample page illustrates how the paper will be subdivided.

Before you click OK, click the Page Setup tab and take a look at the margin settings. WordPerfect uses the current margins for each logical page, so if you keep the default 1-inch margins, you'll have a 1-inch border around each logical page that you won't be able to use. That's a lot of wasted space. Click the Minimum button to quickly set the margins to the minimum allowed by your printer. Figure 8.13 shows the first logical page in a subdivided page. To move to the next page, press Ctrl+Enter.

Finally, when you divide the current page, it dominoes down through the rest of the document. To go back to a full-size page, choose File, Page Setup. Click the Layout tab, and then choose 1 in the Columns text box and 1 in the Rows text box.

TIP FROM

You can center text on a subdivided page with the Center Page feature. Remember that each section is a logical page, so you format it just as if it were a full-size page. Click in the section (page) that you want to center, and then choose Format, Page, Center. Choose Current Page if you only want to center the current page, or choose Current and Subsequent Pages to center all the pages from this point forward.

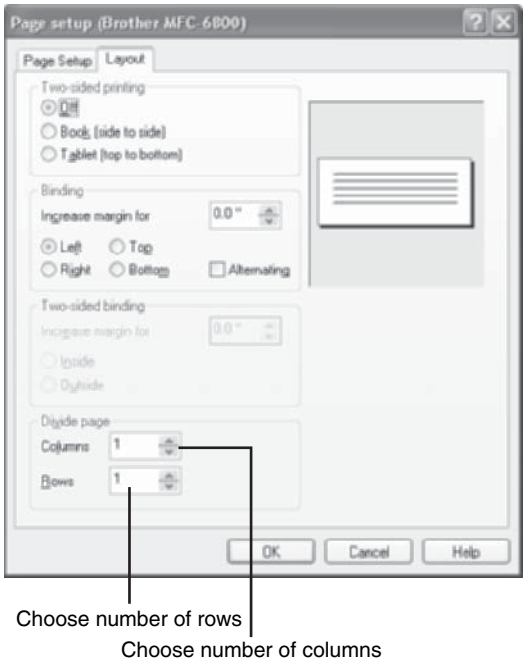


Figure 8.12
Using the Divide Page feature, you can divide a physical piece of paper into multiple logical pages.

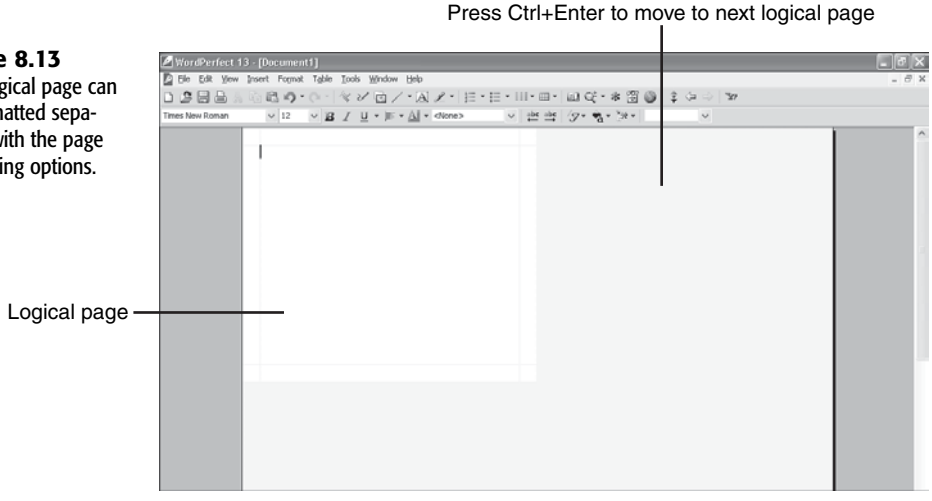


Figure 8.13
Each logical page can be formatted separately with the page formatting options.

ADDING HEADERS AND FOOTERS

Headers hold information that you want printed at the top of every page; *footers* hold information that you want printed at the bottom of every page. You can create two headers and two footers on every page, although usually one header/footer is for odd pages and the other header/footer is for even pages. Headers and footers can contain graphics, page numbers, titles, the filename, revision dates, or any other information about the document.

You create the header or footer on the page where you want it to start. For ease of editing, this is usually the top of the document. For pages where you don't want the headers and footers to print (such as title pages or the first page of a letter), you can suppress the header and footer. You can also use Delay Codes to postpone the effect of a formatting code. See the section "Suppressing and Delaying Codes" later in this chapter.

Formatting codes, such as margin changes and fonts, that you want to affect headers and footers as well as the body text, should be inserted in the document style, rather than in the document itself. To edit the document style, choose File, Document, Current Document Style.

To insert a header or footer, follow these steps:

1. Click Insert, Header/Footer to open the Headers/Footers dialog box (see Figure 8.14).

Figure 8.14
In the Headers/Footers dialog box, Header A is selected by default.

2. If necessary, select Header B, Footer A, or Footer B.

NOTE

> WordPerfect 11 introduced a handy new feature for headers and footers. If you have set specific margins in the document and you want the header/footer margins to match the document margins, place a check mark in the Align with Document Margins check box of the Headers/Footers dialog box. This is a shortcut to setting the margins for both the document text and the header/footer text in the Document Initial Style.

3. Click Create. What happens next depends on which view mode you're using. Either way, the property bar now has some handy buttons you can use:
   - In Page mode, the insertion point moves up to the top of the page, within the header guidelines (see Figure 8.15).
   - In Draft mode, the insertion point moves to a header/footer editing window. You won't be able to see the document text, only the text of the header.

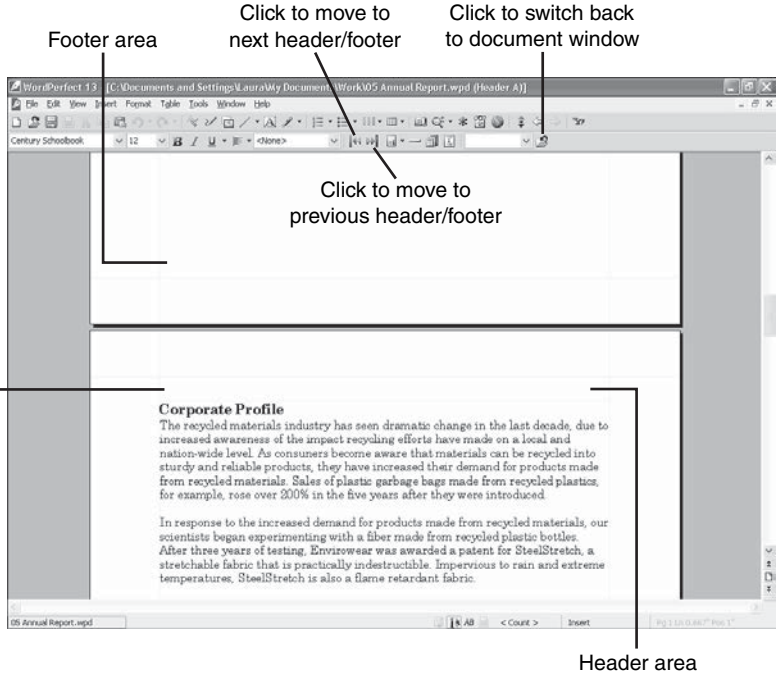


Figure 8.15
In Page View mode, you create and edit the header or footer onscreen, not in a separate window, as with Draft mode. In either mode, you have some new buttons on the property bar.

4. Type the text of the header or footer. Using the menus, add the necessary graphics, tables, and other formatting elements. (Features that can't be used in a header or footer are grayed out on the menus.)

5. Click the Close button, or press Ctrl+F4, to switch back to the document window.

CAUTION

WordPerfect automatically inserts a blank line between the document text and the header or footer. Don't insert a blank line in the header or footer unless you want to increase the distance to two lines.

TIP FROM

Header and footer text in the same font size as the document text is distracting at its best, and downright ugly at its worst. If you're using a 12-point font for the body text, step down at least 2 points, preferably 4 points, for the header or footer text. If you're using a sans-serif font (such as Arial) for your headings and a serif font (such as Times New Roman) for your text, you might also consider using the sans-serif font for the header and footer text to further set it apart from the body text.

TIP FROM

In another lifetime, I installed local area networks in law offices and trained the staff in WordPerfect. One of the first standards we recommended was inserting the path and filename (in a tiny 6- or 8-point font) in a footer that printed on every page but the first page. Anyone who read the document knew exactly where to find the file on the network. (Whether they had rights to the file was up to a system administrator.) To insert the filename in a header or footer, choose Insert, Other. Choose Filename or Path and Filename.

If you're in Page mode, you'll see the header or footer text onscreen with the rest of the document text. If you're working in Draft mode, you won't see header or footer text unless you edit the header or footer. To edit a header or footer, choose Insert, Header/Footer. Select the appropriate header or footer, and then click Edit.

Because headers and footers are printed within the text area of a page, you should probably decrease the margins to allow more space for the body text. It's more attractive to pull the header or footer into the margin space. Remember to change the margins in the DocumentStyle (choose File, Document, Current Document Style), or enable the Align with Document Margins check box in the Headers/Footers dialog box (this feature was introduced in WordPerfect 11). Otherwise, the margin changes won't affect the placement of the headers and footers.

NOTE

Changing the top or bottom margins will always cause an automatic adjustment to the header and footer placement, even if you don't enable the Align with Document Margins option. Furthermore, enabling the check box only performs the action once. If you later make adjustments to the left or right margins, the header and footer will not automatically adjust to the new margins. To readjust the header and footer margins, choose Insert, Header/Footer, select the header or footer, enable the Align with Document Margins check box, and then choose Edit. You can immediately click the Close button because all you are doing is adjusting the margins, not the header/footer text.

If your header or footer prints on top of the page numbers, see "Headers/Footers Versus Page Numbers" in the Troubleshooting section at the end of this chapter.

If you have headers and footers popping up in places where they shouldn't, see "I Have Gremlins Formatting My Document" in the Troubleshooting section at the end of this chapter.

That's how you create a header or footer. The following are some of the other options you can take advantage of:

- You can insert page numbers by clicking the Page Numbering button on the property bar. A drop-down list of options appears (see Figure 8.16). Select the type of page number you want to insert.

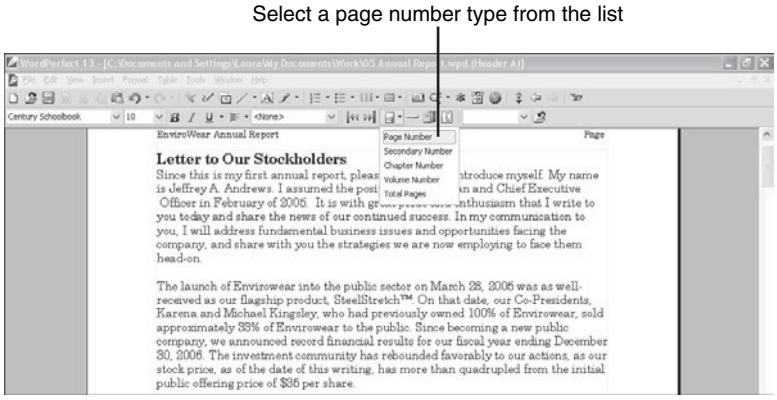


Figure 8.16
Click the Page Numbering button to insert any of the five types of page numbers in a header or footer.

- Click the Horizontal Line button to insert a graphic line in the header or footer.

CAUTION

> Make sure the insertion point is on a blank line when you click the Horizontal Line button. Otherwise, the graphics line plops down right on top of the text.

- Click the Header/Footer Placement button to open the Header or Footer Placement dialog box (see Figure 8.17). The default is to print the header or footer on every page.

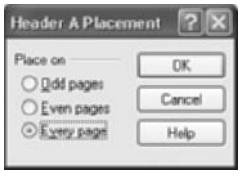


Figure 8.17
Specify on which pages you want the header or footer to print in the Placement dialog box.

NOTE

> Although I usually create one separate header for odd pages and another for even pages, occasionally I use two headers on the same page. One usually contains something standard, such as the title of the document. The other contains something that changes periodically in the document, such as chapter numbers and names. To keep the two headers from overlapping, I keep the first header's text at the left margin and the second header's text flush against the right margin. I make sure to use short titles and chapter names so that they don't run into each other in the middle of the page!

- Click the Header/Footer Distance button, and then type the distance that you want between the header or footer and the body text in the Distance dialog box (see Figure 8.18).

Figure 8.18
You can adjust the space between the header (or footer) and the text in the Distance dialog box.

TIP FROM

When you're working in a header or footer, the Numbering option on the Format, Page menu is gray and there is no option for Value/Adjust under Insert Page Number. So, how are you supposed to adjust the page number in a header or footer? First, insert the page number in the header or footer. Switch back to the document window and choose Format, Page, Numbering. Change Position to No Page Numbering, and then click Set Value and change the page number there. Click OK twice to get back to the document.

SUPPRESSING AND DELAYING CODES

The Suppress feature prevents headers, footers, watermarks, and page numbers from printing on a particular page. It's frequently used to keep these elements from printing on the title page. You have to place a Suppress code at the top of every page on which you don't want a header, footer, page number, or watermark to print.

Click on the page where you want to suppress a header, footer, page number, or watermark, and then choose Format, Page, Suppress. The Suppress dialog box opens (see Figure 8.19). Place a check mark next to the elements that you want to suppress, or choose All to select all the elements at one time. Click OK.

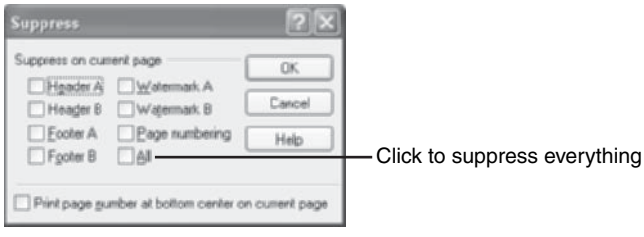


Figure 8.19
In the Suppress dialog box, choose the page elements you do not want to print on the current page.

The Delay Codes feature postpones the effect of formatting changes for a specified number of pages. A delay code is used in situations where you want to skip one or more pages (for example, if you want to skip past the table of contents, preface, or other introductory material before printing headers, footers, or page numbers).

With delay codes, you can insert all your formatting at the top of the document, and then selectively apply the formatting after a certain number of pages. To go one better, you can put all the delay codes in the DocumentStyle, where they can't accidentally be deleted during editing.

To create a delay code, follow these steps:

1. Choose Format, Page, Delay Codes. The Delay Codes dialog box appears (see Figure 8.20).

Figure 8.20
Type the number of pages that you want to skip in the Delay Codes dialog box.

2. Type the number of pages in the Number of Pages to Skip Before Applying Codes text box (or click the spinner arrows to select the number). Click OK to switch to the Define Delayed Codes editing window (see Figure 8.21).

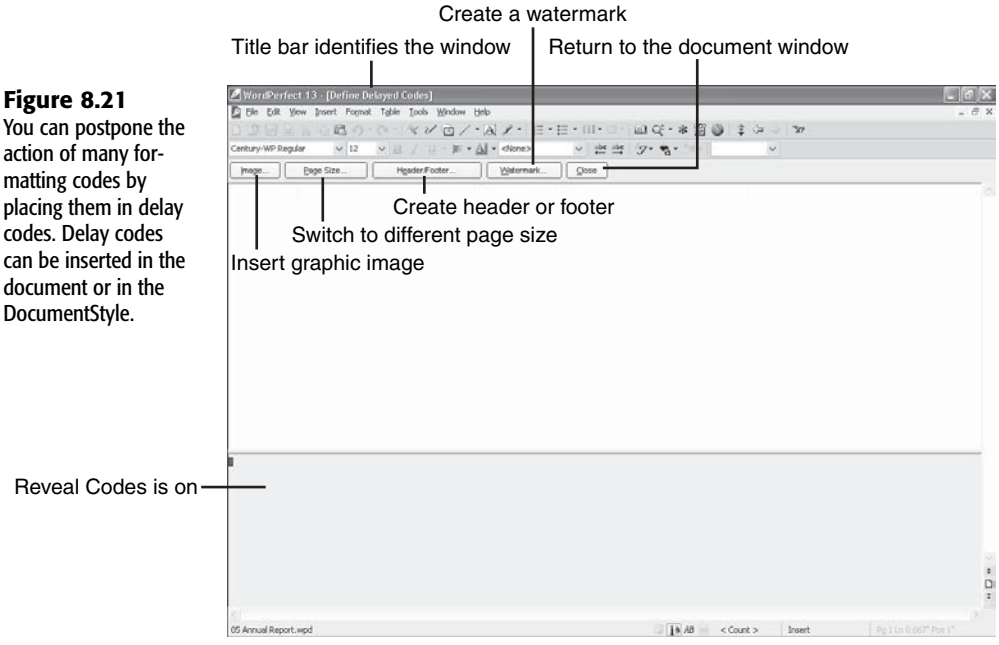


Figure 8.21
You can postpone the action of many formatting codes by placing them in delay codes. Delay codes can be inserted in the document or in the DocumentStyle.

3. Use the menus or the buttons on the toolbar and feature bar to insert the necessary formatting codes.
4. Click the Close button to return to the document window.

No matter where you are on the page, WordPerfect automatically inserts this delay code at the top of the page: [Delay: #]. The # represents the number of pages you want to skip. (WordPerfect calculates the number of pages to skip based on physical pages, not page numbers.) If your insertion point is on page 5 and you set a delay code to skip 3 pages, the

code [Delay: 3] is inserted at the top of page 5. On the page where the formatting takes effect, a [Delay Codes] code that contains the actual codes is inserted at the top of that page. If you move the red cursor to the left of this code, it expands to show you the codes within.

NOTE

> The trick to the Delay Codes feature is to realize that you are actually inserting formatting codes into a code—a delay code. If you create Header A in a delay code, you can't edit that code from the document window; you can only create another Header A. The two headers are independent of each other. The header/footer that you create in a delay code overrides the header/footer that you create in the document. To modify a formatting code in a delay code, you have to edit the delay code by turning on Reveal Codes and double-clicking the [Delay: #] code to edit the contents.

If you're struggling with bizarre formatting in a document, see "I've Got Delay Codes Popping Up All Over the Place" in the Troubleshooting section at the end of this chapter.

SETTING UP COLUMNS

Columns help to break up information and make it easier to read. Take a look at your daily newspaper—it's much easier to read across a short section of text than it is to read across an entire page (especially with small fonts). There are four types of columns in WordPerfect:

- **Newspaper**—Text flows down the first column until the bottom of the page is reached, and then wraps up to the top of the next column. Newspaper columns are used in newsletters, magazine articles, and newspapers.
- **Balanced Newspaper**—Text flows across from column to column so that the columns stay (roughly) the same length, no matter how much text you type in. Because the text is constantly readjusting, typing in balanced columns is awkward. It's best to type the text and then turn on the columns.
- **Parallel**—Text flows down the first column until you push it over to the next column. Typing in parallel columns isn't bad because you decide when you want to move to the next column. However, editing in parallel columns is about as much fun as working on your income taxes. For this reason, most WordPerfect users turn to the Tables feature when they need side-by-side columns.

➔ To learn how to create and edit tables, **see** "Creating Tables," **p. 249**.

- **Parallel with Block Protect**—These columns operate in the same fashion as regular parallel columns except that each row of columns is kept together. If one column in the row becomes so long that it moves down to the next page, the entire row is moved.

DEFINING COLUMNS

Columns can be defined before or after you type text. During a heavy revision, you might find it easier to work outside columns. When you're finished revising, you can turn columns on and have WordPerfect reformat the text.

To define columns, position the insertion point where you want the columns to start. You can also select a portion of text to be formatted into columns so the rest of the text isn't affected.

TIP FROM

It's common to have a title or heading that spreads across the top of the columns, so you might want to leave a blank line or two at the top of the document, and then define the columns underneath, right at the beginning of the text.

The fastest way to define columns is to click the Columns button and then choose the number of columns (see Figure 8.22). These columns are created with a half-inch gutter (that is, space between columns), which is considered a standard setting.

Click to open the Columns dialog box

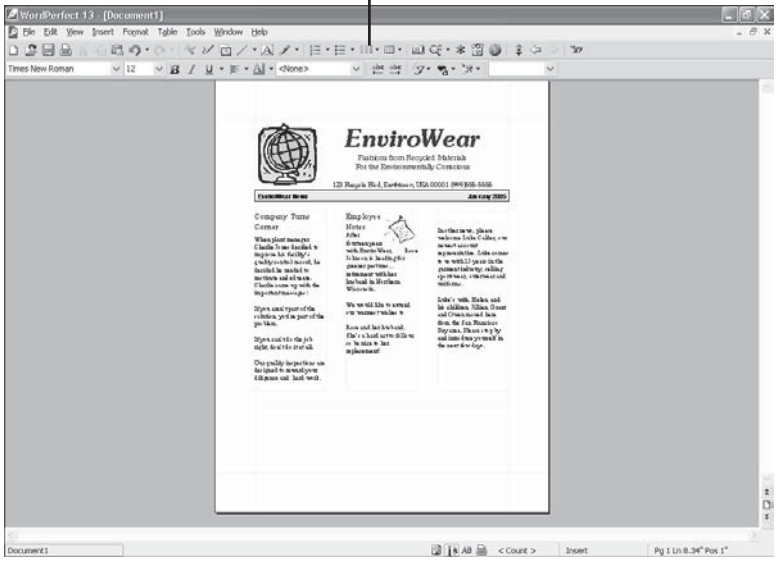


Figure 8.22
You can click the Columns button to turn on columns.

You can easily adjust the column and gutter widths (the space between columns) by clicking and dragging the column guidelines (to see the guidelines, or to turn the guidelines on/off, choose View, Guidelines, Columns) or the markers on the Ruler (choose View, Ruler). If you want to define balanced columns, or if you want a little more control (and who doesn't?), you can use the Columns dialog box to define the columns.

To define columns with the Columns dialog box, follow these steps:

1. Choose Format, Columns to display the Columns dialog box (see Figure 8.23).
2. If you want more than two columns, type the number of columns in the Number of Columns text box.

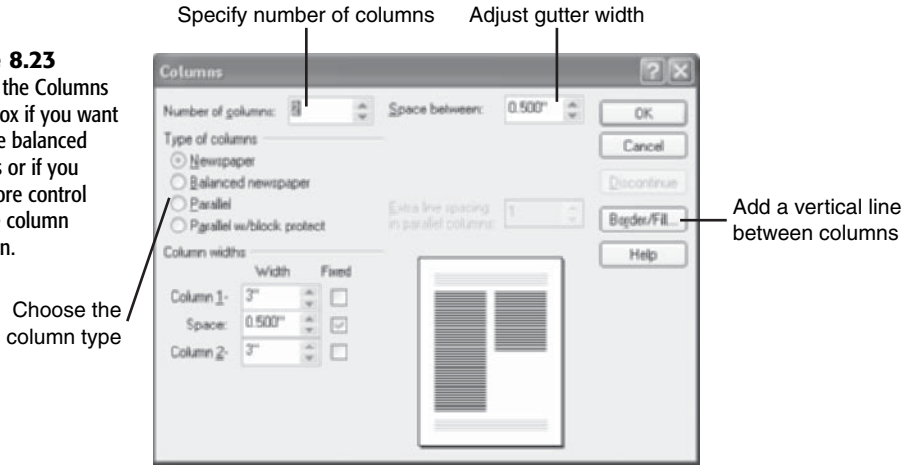


Figure 8.23
You use the Columns dialog box if you want to define balanced columns or if you want more control over the column definition.

3. Choose a column type in the Type of Columns section.
4. If necessary, increase or decrease the gutter width in the Space Between text box.
5. If necessary, adjust the individual column widths and space between the columns in the Column Widths section.
6. If you want a vertical line to appear between the columns, click the Border/Fill button. Scroll down through the Available Border Styles list box until you see the Column Between style (see Figure 8.24). Click OK.

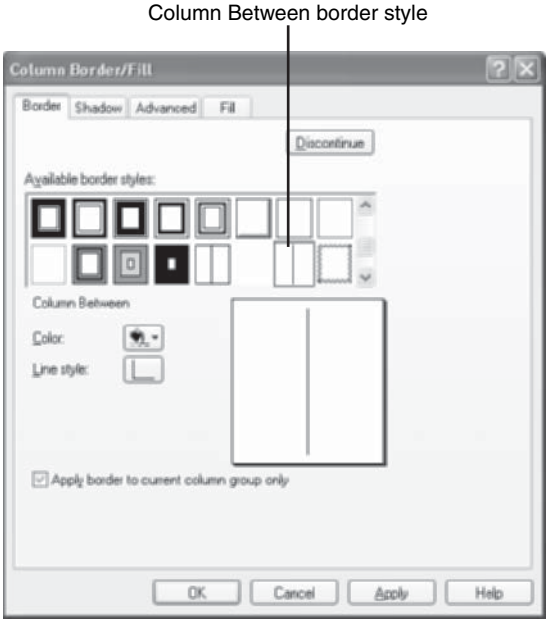


Figure 8.24
The Column Between border style applies a thin vertical line between each set of columns.

➔ If you're curious about graphic lines and how to customize the line styles, **see** "Inserting Horizontal and Vertical Lines," **p. 322**.

➔ For more information on adding borders, shading, and drop shadows, **see** "Adding Borders, Drop Shadows, and Fills," **p. 183**.

NOTE

> Don't worry if you don't see the vertical line between the columns on the sample document in the Columns dialog box. Because you applied the line in the Column Border/Fill dialog box, you'll see the line on the sample document there, not in the Columns dialog box.

7. Click OK to close the Column Border/Fill dialog box and turn on the columns (see Figure 8.25) .

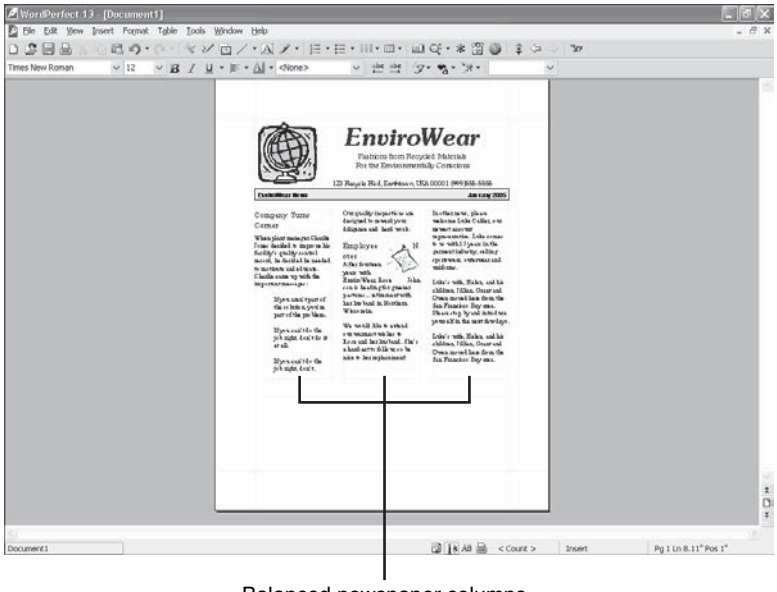


Figure 8.25
In this document, three balanced newspaper columns have been defined. The gutter space has been reduced to .3 inch.

If your balanced columns are not balanced, see "My Balanced Newspaper Columns Are Uneven" in the Troubleshooting section at the end of this chapter.

You can turn columns on and off as often as you like. To turn off columns, click the Columns button and choose Discontinue (or choose Format, Columns, and then click Discontinue). When you're ready to turn columns on again, either click the Columns button and choose the number of columns (to define the default newspaper columns with 1/2-inch gutter), or choose Format, Columns to define columns with settings other than the defaults.

TYPING AND EDITING IN COLUMNS

Typing and editing in columns can be a little tricky. You can save yourself some frustration if you finish typing and editing the text before you turn on columns. If, for some reason, you need to work in columns, the mouse is the quickest method for moving the insertion point—just click where you want to go. Table 8.1 lists some keyboard shortcuts you can use.

TABLE 8.1 SHORTCUTS FOR MOVING AROUND IN COLUMNS

Press This	To Do This
Ctrl+Enter	Start a new column (insert a column break)
Alt+right arrow	One column to the right
Alt+left arrow	One column to the left
Alt+End	Last line in the column
Alt+Home	First line in the column

HYPHENATING WORDS

When you're formatting text into columns, hyphenating words becomes an important issue. If you hyphenate too much, you frustrate the reader; if you don't hyphenate enough, you get gaps in the text. You can let WordPerfect decide where words should be hyphenated with the Hyphenation feature. WordPerfect uses the installed Oxford Dictionary to determine the correct place to hyphenate a word. Choose Tools, Language, Hyphenation to open the Line Hyphenation dialog box (see Figure 8.26).

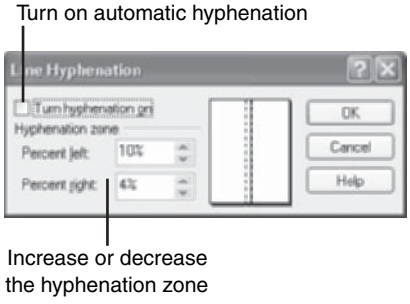


Figure 8.26
The Hyphenation feature will automatically hyphenate words if they extend past a specified hyphenation zone.

To turn on automatic hyphenation, choose Turn Hyphenation On. The hyphenation zone is a narrow area that surrounds the right margin. If you decrease the hyphenation zone values, more words will be hyphenated; if you increase the hyphenation zone values, fewer words will be hyphenated.

If you prefer to specify where words should be hyphenated (if they extend into the hyphenation zone) , there are several other methods that can be used. Choose Format, Line, Other Codes to display the Other Codes dialog box (see Figure 8.27).

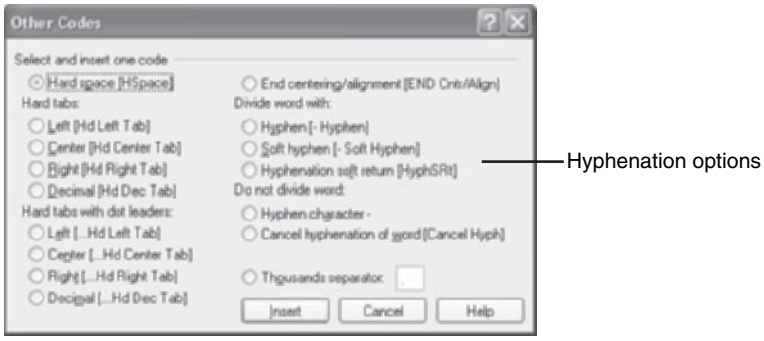


Figure 8.27
The Other Codes dialog box contains a series of hyphenation codes that can be assigned, one word at a time.

Choose from the following options:

- Choose Hyphen if you want to insert a hyphen in a word. The word will be hyphenated regardless of where it falls on a line.
- Choose Soft Hyphen if you want the word to be hyphenated only if it spans the hyphenation zone. The hyphen remains invisible until the word moves close to the end of the line. You can also press Ctrl+Shift+hyphen to insert a soft hyphen.
- Choose Hyphenation Soft Return to divide a word without using a hyphen, but only if the word spans the hyphenation zone. Use this option for words that are divided by slashes, an en dash, or an em dash.
- Choose Hyphen Character if you want to keep text together on either side of a hyphen. The shortcut keystroke for a "hard" hyphen (keep text together) is Ctrl+-.
- Choose Cancel Hyphenation of Word if you want to exclude a certain word from automatic hyphenation. The word will be wrapped to the next line if it happens to span the hyphenation zone.

USING MAKE IT FIT

Didn't your mother tell you there would be days like this? Your letter's signature block spills over to the second page…or your newsletter doesn't have quite enough text to fill the page. It happens to the best of us. Before you run screaming from the room at the prospect of spending an hour adjusting font sizes and margins, take a deep breath and let WordPerfect do all the dirty work.

Make It Fit does just that—it makes text fit however many pages you specify. Now, you can't make one page of text stretch out into three pages, and you can't take three pages of text and expect to squeeze it into one page. The number of pages that you specify must be at least 50% of the current size.

You can use Make It Fit on selected text or on the entire document, so if you want to work on only a section of text, select it first. Choose Format, Make It Fit to open the Make It Fit dialog box (see Figure 8.28). (If you selected text, the Top Margin and Bottom Margin options are not available.)

NOTE

WordPerfect 9 introduced a new angle on Make It Fit, called Block Make It Fit, which is also present in WordPerfect X3. You can select a block of text and apply Make It Fit to only that text, leaving the rest of the document unaffected.

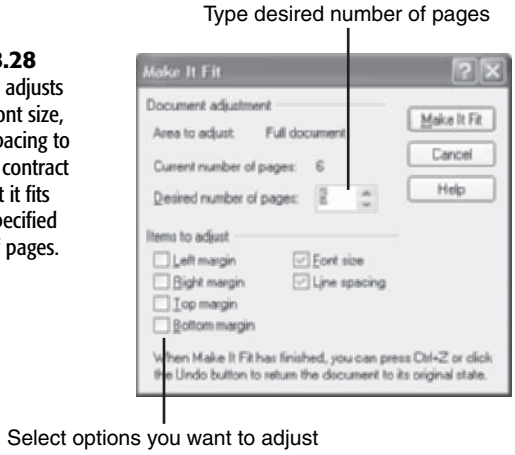


Figure 8.28
Make It Fit adjusts margins, font size, and line spacing to expand or contract text so that it fits within a specified number of pages.

Take a look at the current number of pages and then type the number of pages that you want to fill in the Desired Number of Pages text box. Select the options that you want Make It Fit to use to reformat the text and then click Make It Fit. It may not be obvious, but if you don't want Make It Fit to alter one of the settings (the top/bottom margins, for example), make sure you remove the check mark next to the setting.

NOTE

If you have hard page codes in the document, you get a message that warns you that these codes might affect how well the document is formatted.

ADDING BORDERS AROUND PAGES

Adding page borders is so similar to adding borders around paragraphs that I'm only going to cover the difference between the two here.

➔ For more information on adding borders, drop shadows, and fills, **see** "Adding Borders, Drop Shadows, and Fills," **p. 183**.

There are 35 additional borders available for pages in the Page Border/Fill dialog box—they are called fancy borders. To see them, choose Format, Page, Border/Fill to open the Page Border/Fill dialog box. Click the Border Type drop-down list arrow and choose Fancy. When you choose Fancy borders, a Change button appears in the dialog box (see Figure 8.29). Click the Change button to open the Change Folder dialog box, where you can choose another borders folder.

Figure 8.29
The fancy borders are available only in the Page Border/Fill dialog box.

CAUTION

When you create a border using the line styles, WordPerfect automatically allows space between the text and the border, which is positioned on the margins. A fancy border can overwrite the text, so you might have to make some adjustments to the margins.

To apply a line page border to the current page only, choose Apply Border to Current Page Only. In most cases, you apply a page border to all the pages in the document to maintain consistency. However, you can turn the border off on certain pages if you want. Click on the page where you want the border to stop, and then choose Format, Page, Border/Fill, Discontinue.

TIP FROM

The Page Border/Fill dialog box offers a list of fancy borders. You can customize these borders in Presentations and then save them with the same name or a different name. The fancy borders are located in the folder specified in the Files Settings dialog box. Choose Tools, Settings (or press Alt+F12), Files, click the Graphic tab, and look in the Default Fancy Borders Folder text box for the location.

TIP FROM

Round-cornered borders add an interesting effect. You can change the border corners for the line borders to anything from slightly rounded to almost circular. To round off the corners on a border, choose Format, Page, Border/Fill. Click the Advanced tab, and then click Rounded Corners. To adjust the amount of roundness, type a value in the Corner Radius text box, or click the spinner arrows to adjust the value. Keep an eye on the sample document to see how the roundness looks.

TROUBLESHOOTING

CAN'T FIND THE RIGHT MARGINS TO CENTER THE PAGE

I've been trying unsuccessfully to adjust the top and bottom margins so that I can center titles on the title page. There must be an easier way!

There is—it's called Center Page, and it takes only a second to set it up. Choose Format, Page, Center. Choose Current Page to center the current page. Choose Current and Subsequent Pages to center pages from the insertion point on. Choose No Centering to stop centering pages (after you've used the Current and Subsequent Pages option).

Keep in mind that Center Page will center the text between the left and right margins, not the top and bottom edges of the page. If you have unequal top and bottom margins, the text will not be perfectly centered on the page.

EDITING A CUSTOM PAGE NUMBER

I decided to go back and add some text to a plain page number. After I made the change, I noticed that part of my document has the revised page number, but the rest has only the original page number. What's going on here?

When you edit a custom page number, you have to be sure you go back to the page where you created the custom page number. This might be at the top of the document or the beginning of a new section or chapter. Going back to the original page gives you the opportunity to edit the original code, rather than create another code (with your changes) later on in the document that conflicts with the original code.

MANUAL FEED IS ON ALL THE TIME

I made a few changes to one of the paper size definitions, and now whenever I print something, I have to insert every piece of paper into the manual feed tray.

You've accidentally changed the paper source to manual, so the printer thinks that you want to insert the paper by hand. This is a great feature when you want to manually feed the letterhead and allow the printer to grab second sheets from the tray, but it's a real pain when it gets turned on by accident. Select the paper size in the Page Setup dialog box and click the Edit button. Click the Source drop-down list arrow and choose Default.

HEADERS/FOOTERS VERSUS PAGE NUMBERS

I have my page numbers positioned in the bottom center of every page, but they are printing on top of the footer text. Isn't there some way to print the footer text in one place on the line and the page number somewhere else?

As you've already surmised, page numbers, headers, and footers all use the same area of the page. Most of the time they all get along. When a conflict occurs, the page number doesn't replace the header or footer (or vice versa); they are both printed, one on top of the other.

You have two choices: You can either choose another position for the page number (such as the bottom right), or you can insert the page number as part of the footer. A third choice might be to place a hard return or two at the end of the footer so it pushes the footer text slightly up on the page. This might cause the footer to display above the page number, so if you aren't happy with the results, try one of the other fixes.

I Have Gremlins Formatting My Document

I don't know what I did to deserve this, but I'm working on a document for a friend, and all sorts of crazy things are happening. Headers and footers are popping up in places where they don't belong, page numbers are starting midway through the document, and margin changes are coming out of nowhere. When I print, the document comes out on two different types of paper. The worst part about the whole thing is that I can't find a code to delete or edit and I've even used Find and Replace to try to locate it.

It is rather unsettling to see formatting changes that can't be traced back to a code. One of two things can cause this type of situation: styles and delay codes. There could be styles in the document that contain the offending formatting codes, or the formatting codes might be inside a delay code. Either way, you can't remove or edit the formatting codes until you've located the style or delay code that contains the codes. Start at the top of the document and look for a [Delay:#] code (you might consider using Find to locate it). Double-click the code to edit the contents.

A style code could be anywhere. Use Find to locate the style code, and then double-click it to edit the contents.

I've Got Delay Codes Popping Up All Over the Place

I'm working on a document that someone sent me via e-mail and I can't figure out where all of the delay codes are coming from. What can I do to clean up this document?

The person who sent you the document might not be intentionally entering delay codes, but they are undoubtedly doing something that WordPerfect interprets as a request or need for a delay code.

For example, if you change the margin in the middle of a paragraph, a delay code will be placed at the top of the page (instead of a margin code). If the page began with hard returns or at the beginning of a paragraph, a margin code is placed at the top of the page instead of a delay code.

Repeated adjustments to the margins is one thing that often causes extra delay codes, but it really depends on what else is going on in the document, where the cursor is when margins are changed, and so on. Another thing that can result in lots of delay codes is importing documents from Word format—there are several Word formatting arrangements that are converted to delay codes when the document is imported to WP. Keep in mind that version X3 does a much better job of converting Word documents than previous versions.

MY BALANCED NEWSPAPER COLUMNS ARE UNEVEN

I've defined balanced columns and typed in text, but the columns aren't all the same length.

You probably have some blank lines in there throwing things off. Turn on Reveal Codes and delete any extra [HRt] codes. You might also have some formatting options that conflict with columnar formatting. Click in the paragraph that isn't balanced, and then choose Format, Keep Text Together and deselect all the options.

ROUNDED CORNERS DON'T DISPLAY CORRECTLY

I've rounded the corners on a page border, but the corners still look square on the screen.

Rest assured, the rounded corners will print correctly even though they aren't displayed onscreen. To display rounded corners, WordPerfect would have to redraw the screen every time you type a character, which would result in serious performance degradation.

CHAPTER 9

Formatting with Styles

In this chapter

by Laura Acklen

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A QUICK OVERVIEW OF STYLES

Most of us begin making our documents look good by using the "brute force" method. If the document needs to be fixed, we just add a formatting code here or there until it approximates what we're looking for. Unfortunately, if you have to create that kind of document again, you'll spend lots of time trying to duplicate the steps you took, and often you don't really end up with the same results.

Suppose, for example, you want each section heading in your document in a certain font and size, and you want them all bold and italic, with a horizontal line underneath that extends the width of the page. Instead of applying each of those elements to each heading, one by one, you can apply a style to each heading that already includes all those elements.

Styles are named collections of formatting procedures, such as fonts, margins, tabs, and so on. When you apply a style in your document, you apply one or more formatting options. Thus, everything with a particular style has the same look.

In addition, any change you make to a style automatically changes any text where you already applied that style. For example, if you decide you don't want your headings in italic, you can remove the italic format from your style, and WordPerfect removes it from each place the style was used. The other formats of the heads, such as font, size, and so on, remain intact.

STYLES VERSUS MACROS VERSUS QUICKWORDS

Just what is the difference between styles and macros? Couldn't you just create a macro to accomplish the formatting you want?

Indeed, macros are powerful and can perform many formatting tasks. However, after you run a macro, you end up with formatting codes in your document as if you had placed them there yourself. *Macros* automate the process of inserting format codes, but otherwise there is nothing in the document to distinguish the fact that you used a macro instead of formatting the text one step at a time.

Styles, on the other hand, remain in the document and format the text they are applied to. If you remove the style, you remove all the formatting it provides, not only in one location, but everywhere it appears in the document. If you change a style, the change takes place automatically throughout the document. Thus, styles offer much more flexibility and control for formatting than do macros.

QuickWords, words that expand when you type them and which can include formatting, is another powerful formatting tool. But like macros, the end result is simply text and format codes as if you had created each code yourself.

➔ For information on using QuickWords, **see** "Setting Up QuickWords," **p. 136**.

➔ For more information on macros, **see** "Using Macros to Automate Repetitive Tasks," **p. 568**.

USING QUICKFORMAT TO CREATE STYLES ON-THE-FLY

WordPerfect's QuickFormat feature enables you to make and use styles on-the-fly. You begin by formatting text, and then copying and applying the results at other locations in the document. Consider, for example, the document shown in Figure 9.1. Suppose you want to make each header stand out by changing its font and making it both bold and italic. Follow these simple steps:

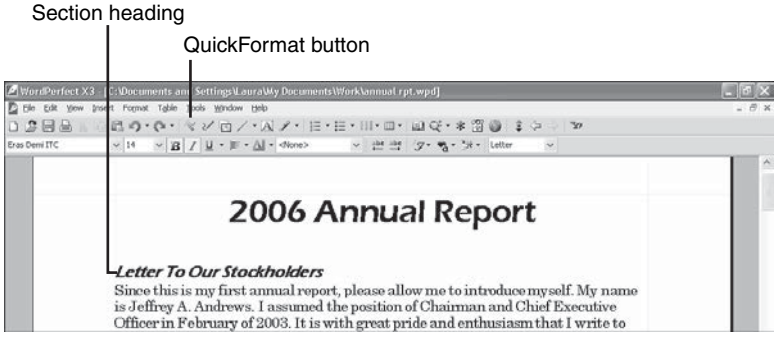

Figure 9.1
The use of styles makes it easy to apply consistent formatting throughout a document—for example, in section headings.

1. Begin by applying the formatting you want to the first section heading. For example, if you change the font, and add bold and italic, you get the result you see in Figure 9.1.
2. Position the insertion point anywhere on the formatted heading, and choose Format, QuickFormat, or click the QuickFormat button on the toolbar. WordPerfect displays the QuickFormat dialog box (see Figure 9.2).

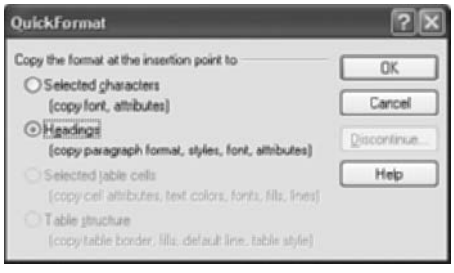

Figure 9.2
The QuickFormat dialog box enables you to capture a formatting style and apply it to selected text or to heading paragraphs.

3. Because you want to produce consistent-looking headings, choose the Headings option.
4. Click OK, and WordPerfect returns you to the document, but now the mouse pointer is shaped like a paint roller with a trailing swath of paint (see Figure 9.3).
5. Move to the next section heading, point the tip of the paint swath at the heading, and click. WordPerfect applies the styles from the first heading to the heading you click.

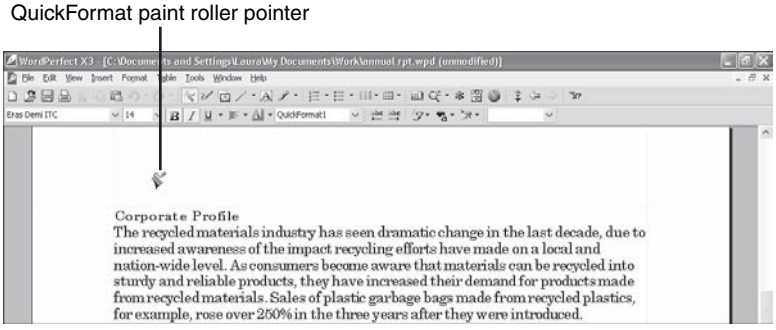

Figure 9.3
The mouse pointer changes to indicate that you will apply a heading style when you click the mouse.

6. Continue through the document, clicking each heading to apply the QuickFormat style.
7. To turn off the QuickFormat process, choose Format, QuickFormat; or simply click the QuickFormat button on the toolbar.

Each time you create a QuickFormat style, WordPerfect adds the style to your style list and numbers it (for example, QuickFormat1, QuickFormat2, and so on). If you want to use the style again, you can follow the same procedures listed previously or you can apply the style from the style list, following these steps:

1. Position the cursor on the heading you want to format.
2. Choose Format, Styles. WordPerfect displays the Styles dialog box (see Figure 9.4).

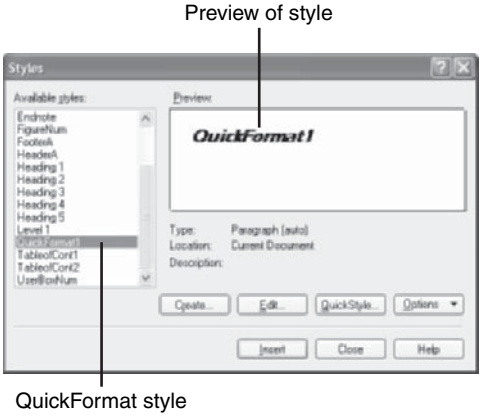

Figure 9.4
You can use the Styles dialog box to select and apply a style to your document.

3. Click the QuickFormat style you created for the headings (for example, QuickFormat1).
4. Click Insert. WordPerfect applies the style to the heading.

Heading format styles apply to entire paragraphs. If you want to copy only fonts and attributes and apply them to selected text, the procedure is a bit different:

1. Begin by applying the formatting you want to your text. For example, you can apply a text color with bold and italics, as shown in Figure 9.5.

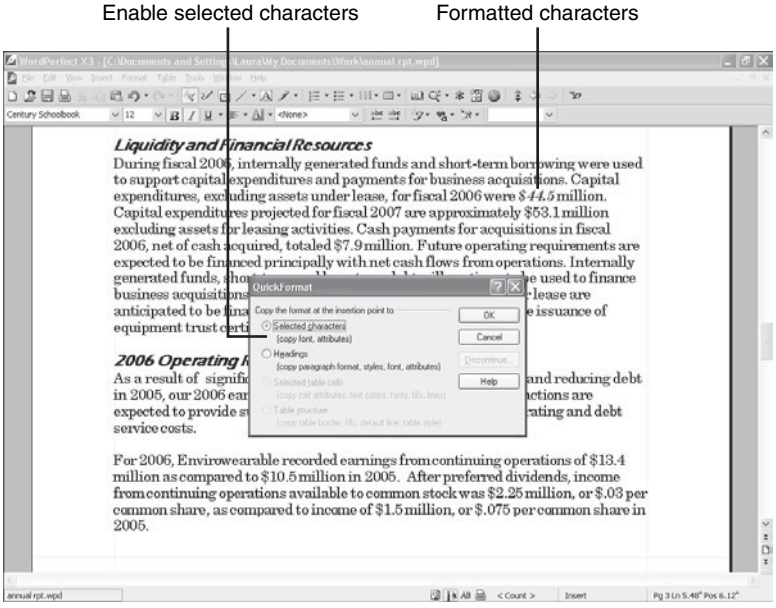

Figure 9.5
You can use QuickFormat to pick up special formatting and apply it to selected text.

2. Position the insertion point anywhere on the formatted text, and choose Format, QuickFormat, or click the QuickFormat button on the toolbar. WordPerfect displays the QuickFormat dialog box (refer to Figure 9.2).
3. Because you now want to copy fonts and attributes, choose Selected Characters.
4. Click OK. WordPerfect returns you to the document and the mouse pointer is shaped like a paint roller with a trailing swath of paint.
5. Move to the text you want to format and use the mouse to select it. When you release the mouse button, WordPerfect applies the styles from the original text to the text you just selected.
6. Continue through the document, selecting text to which you want to apply the QuickFormat style.
7. Turn off QuickFormat by choosing Format, QuickFormat, or by clicking the QuickFormat button on the toolbar.

NOTE

QuickFormats are saved with the current document, but are not available to other documents you create. For more information on renaming, editing, and saving styles for use in all your documents, see the section "Creating Custom Styles," later in this chapter.

UNDERSTANDING STYLES

Styles are primarily formatting tools. A style consists of various format elements that you apply collectively to all or part of a document. If all you ever need is a quick and easy way to apply basic formatting, QuickStyles will probably do the trick. But if you need to explore the full power of WordPerfect's styles, you also need to understand how and where they work.

TYPES OF STYLES

Although styles are relatively easy to create and use, you can become confused when you first encounter paragraph styles, template styles, or system styles. It helps to think about styles as different types, depending on their function or location.

First, there are three basic *types* of styles, each with its own purpose, and named according to the portion of the document it affects:

- Document (or open) styles
- Paragraph styles
- Character styles

Second, there are three *locations* for styles:

- Document styles (styles saved with a document)
- Template styles (styles saved in templates)
- System styles (WordPerfect's default styles)

Finally, there are *feature* styles that apply to specific types of text, such as the following:

- Specialized text styles, such as hyperlinks and headings
- Outline styles for bullets, numbered paragraphs, and outlines
- Graphics styles for graphics boxes, text boxes, equation and figure numbers, and so on
- Footnote and endnote styles
- Header, footer, and watermark styles

Styles can be a combination of any of these categories. For example, a numbered outline style is also a paragraph style, and can be stored in the current document or in a template for use in all your documents.

➔ For information on bullet, list, and outline styles, **see** Chapter 11, "Organizing Information with Lists and Outlines," **p. 283**.

➔ For information on styles for graphics boxes, **see** Chapter 12, "Adding Graphics to Your Document," **p. 308**.

➔ For details on footnote, endnote, and other specialized heading styles, **see** "Formatting Footnotes," **p. 402**.

DOCUMENT, PARAGRAPH, AND CHARACTER TYPES OF STYLES

Document styles are found at the beginning of the document because they establish certain features such as paper size, margins, tab stops, line spacing, and fonts for the entire document. These are *open* styles, as opposed to *paired* styles, because they are turned on and left open throughout the document. In earlier versions of WordPerfect, the DocumentStyle style is called Document Initial Style.

For example, if you insert formatting codes in your document but don't get the results you expect (for example, page numbers are in the wrong font), you probably need to look at the DocumentStyle (see the section "Editing Styles" later in this chapter) .

Paragraph styles, as the name indicates, affect entire paragraphs. You typically use paragraph styles for such things as headings, headlines, titles, and bibliographic entries.

A paragraph style overrides DocumentStyle settings, or other settings created by the insertion of formatting codes. To apply a paragraph style, simply place the insertion point anywhere in the paragraph, and then choose Format, Styles. WordPerfect displays the Styles dialog box (refer to Figure 9.4). Select the style you want and click Insert to apply that style. Note, in Figure 9.6, that the style affects the entire paragraph, but does not affect paragraphs before or after the style.

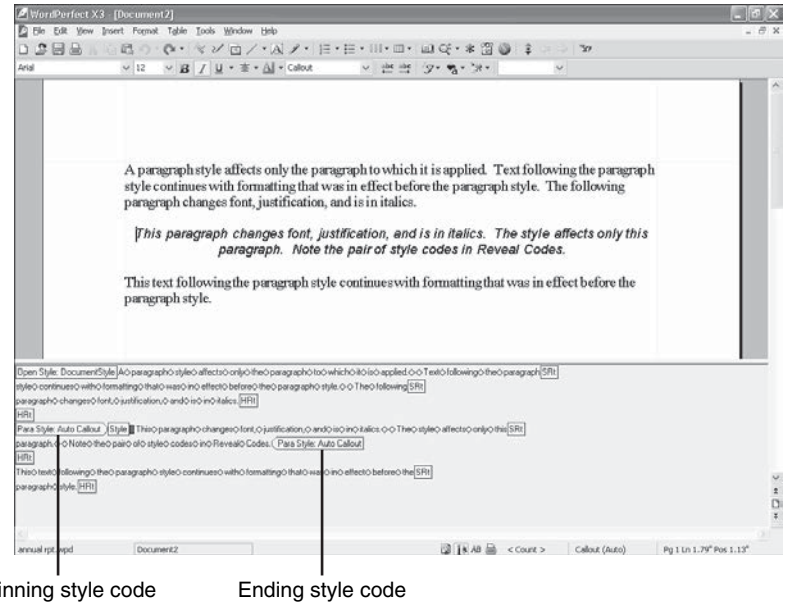

Figure 9.6
A paragraph style formats the entire paragraph to which it is applied, but does not change the formatting before or after the paragraph. Note the pair of style codes in Reveal Codes.

Character styles affect sections of text, but not whole paragraphs or documents, and are usually limited to text attributes such as font, font size, bold, and italic. They also override paragraph or document styles.

Although character styles seem similar to pairs of WordPerfect attribute codes (such as bold), they are much more easily changed. For example, you can use a style called Citation to apply underlining to books you reference. If you later decide to put citations in italic instead of underlining them, you simply change the style, and WordPerfect automatically updates all citations.

THE LOCATION OF STYLES

WordPerfect always stores styles you create or import in the document itself (see Figure 9.7, which illustrates the location of styles and where they can be stored). You can edit such styles, but they affect only the current document. However, if you save custom styles to a templateyou can apply them to other documents as well.

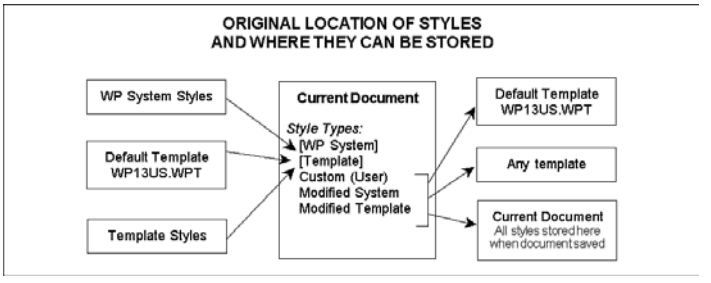

Figure 9.7
WordPerfect styles that come from the WordPerfect system and from templates can be modified or created by the user within a document. Modified styles can be saved with the document or to other templates.

All WordPerfect documents are based on templates that contain styles, macros, toolbars, keyboard definitions, and so on. By default, regular documents start by using the `wp13`*us*`.wpt` template (*us* varies, depending on the language and country version of WordPerfect you use).

Thus, the current document contains styles that came from a template (either the default template or a specialized template) or from the WordPerfect system. The current document can also contain styles you create or edit.

Certain default styles are part of the WordPerfect system, and as such are always available to restore settings that you might have changed. You cannot change these styles, but you can import them and then change them for the current document. Further, you can save system style changes to a template.

You can save styles with the current document only, or you can save them to one of the specialized templates or to the default template for use with future documents. You cannot change the system settings because these are used to restore styles to their default settings.

The following sections describe how to use styles, and how to create, edit, save, and retrieve them.

FEATURE-SPECIFIC STYLES

This chapter explores how to create and edit styles in general. These principles and procedures also apply to feature-specific styles such as footnotes or graphics. However, you might have to approach them differently. For example, the Styles list does not include a footnote style. Suppose you modify how that style is used by choosing Insert, Footnote/Endnote; and then in the Footnote/Endnote dialog box choosing Options, Advanced; and in the Advanced Footnote Options dialog box, editing the numbering style. Doing so edits the style and WordPerfect adds the edited style to the current document's style list (see Figure 9.8).

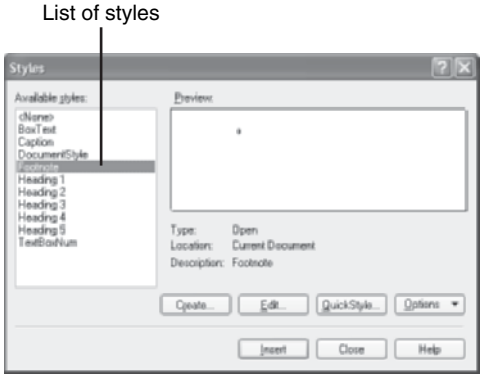

Figure 9.8
If you modify WordPerfect system styles, the modified style appears in the list of available styles in that document. Otherwise, unless you import them, WordPerfect system styles do not appear in the list.

You can also edit a WordPerfect system style (those that come with WordPerfect, such as footnotes) directly from the document's styles list (see "Editing Styles," later in this chapter). By default, WordPerfect displays only the heading system styles. To display all system styles, from the Styles dialog box, choose Options, Settings, and then in the Styles Settings dialog box, make sure WordPerfect System Styles is checked and choose WordPerfect Heading Styles and All Other System Styles (Header/Footers, Numbering, and so on). Click OK to return to the Styles dialog box where WordPerfect now displays all system styles along with any document-specific styles you might have created.

USING WORDPERFECT'S STYLES

Whether your document contains few or many styles, and whether these styles come from a template, from the WordPerfect system, or from your own creation, using styles is simple.

Determine exactly where you want to apply a style. You can apply styles to

- **The entire document**—This requires editing the DocumentStyle (see the section "Editing Styles," later in this chapter) or positioning the cursor at the beginning of the document to apply an open style.
- **A paragraph**—Simply position the cursor anywhere in the paragraph you want to format.
- **A selection of text**—Use the mouse or the keyboard to select the specific text you want to format.

TIP FROM

To apply a character style, you must first select the text you want. WordPerfect normally selects entire words at a time, but you can select the specific characters you want by holding down the Alt key while dragging the mouse. You also can select text one character at a time by holding down the Shift key while moving the cursor with the keyboard.

To apply a style, follow these steps:

1. Click the Styles drop-down list on the property bar (see Figure 9.9).

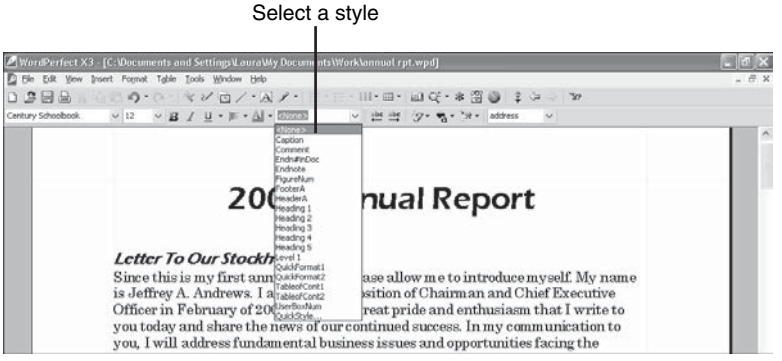

Figure 9.9
The fastest way to select a style is to choose one from the Styles list on the property bar.

2. Click the style you want to use.

If you want a bit more control over which style you use, follow these steps instead:

1. Choose Format, Styles or press Alt+F8. WordPerfect displays the Styles dialog box (see Figure 9.10).

Figure 9.10
The Styles dialog box enables you to select, create, edit, or save styles. You can also preview the effect of a style before you insert it.

2. In the Available styles list, click the style you want to use. WordPerfect displays an approximation of the effect of the style in the Preview box.
3. To apply the style to the document, click Insert.
4. To close without applying the style, click Close, or press Esc.

NOTE

> The list of styles you see varies depending on the template you start with, the styles you import, changes you make to feature styles (such as footnote numbering), and custom styles you create, including QuickFormat or QuickStyle styles.

CREATING CUSTOM STYLES

Predefined styles might be of some use to you, but you'll notice the real value of styles only after you create and use your own. Fortunately, styles are easy to create and edit.

CREATING QUICKSTYLES

One of the easiest ways to create a basic formatting style is to first format some text as you want the style to look and then use the QuickStyle feature to create a style based on that formatting.

To use QuickStyle, follow these steps:

1. Format the text selection or paragraph with the features you want to include in the style. For example, in Figure 9.11, the paragraph is 10-point Arial italic, and is right justified.

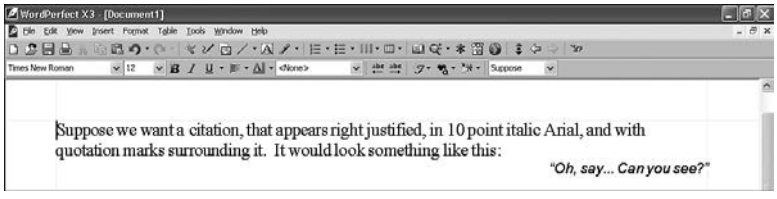

Figure 9.11
You can format text first, and then use QuickStyle to create a style based on the format you used.

2. Position the cursor anywhere in the selection or paragraph. You need not select the text.
3. Choose Format, Styles (or press Alt+F8) to access the Styles dialog box.
4. Click QuickStyle to display the QuickStyle dialog box (see Figure 9.12).

Figure 9.12
In the QuickStyle dialog box, you name the style and designate the type of style you want it to be. You can also add an optional description that helps you remember what the style is used for.

TIP FROM

You can also select the QuickStyle feature by clicking the drop-down Styles list on the property bar and selecting QuickStyle.

5. In the Style Name text box, type the name of the style, using 20 or fewer characters.
6. You can also type a longer description in the Description text box. This can be useful later if you want to use the style, but can't remember what it does by the name alone.
7. Choose Paragraph if you want the style to apply to entire paragraphs, or Character if you want to format only selected text.
8. Click OK to add the style to your current document and to return to the Styles dialog box. Your new style appears in the Available Styles list (see Figure 9.13).

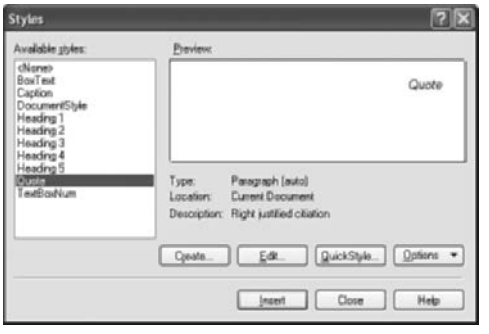

Figure 9.13
The Preview box in the Styles dialog box enables you to preview the effect of a selected style.

When you click a style, note that WordPerfect displays the effect of the style in the Preview box, and also displays the longer description that you provided.

NOTE

QuickStyle does not always convert formatting settings to a style. For example, if you change the margins for a single paragraph, or use a tab to indent the first line, QuickStyle does not save these formatting changes. However, QuickStyle does recognize paragraph formatting that you change using the Paragraph Format dialog box (which you reach by choosing Format, Paragraph, Format).

CREATING STYLES

If you know what you want in your style, you can often create the style more quickly and with more control by accessing the Styles Editor dialog box and adding style information directly into the style. In addition, you can add specific text or special characters, along with formatting information.

For example, to create the Quote style, first set up the style by following these steps:

1. Open the Styles dialog box by choosing Format, Styles or by pressing Alt+F8.
2. Click Create to open the Styles Editor dialog box. Figure 9.14 shows the Styles Editor dialog box, with Show 'Off Codes' already selected and codes added to the editing screen.

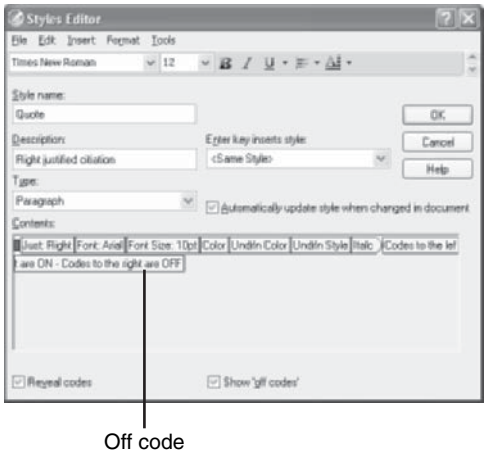

Figure 9.14
The Styles Editor dialog box, shown here with the Off code, gives you control over the content and effect of a style.

3. Provide a style name (for example, Quote).
4. Provide a description (for example, right-justified, italic Arial text).
5. By default, when you press Enter at the end of a paragraph that uses a style, the next paragraph continues using the same style. If you want to turn off the paragraph style when you press Enter, replace `<Same Style>` with `<None>` in the Enter Key Inserts Style box.
6. Because you want to apply the style to an entire paragraph, be sure Paragraph appears in the Type box.
7. If you want changes to one Quote-style paragraph to appear automatically in all other Quote-style paragraphs, check the Automatically Update Style When Changed in Document check box.
8. Do *not* click OK yet; you want to stay in this dialog box.

You're now ready to add the style's formatting codes to the Contents box. This box displays the style in a Reveal Codes format, where you can add text, special characters, and format codes. Suppose, for example, you want your Quote paragraph to add a quotation mark at the beginning of the paragraph, and another at the end, along with other formatting codes (refer to Figure 9.14). Follow these steps:

1. Choose the font style from the Font list on the property bar or from the Font dialog box (which you access by choosing Format, Font).

NOTE

> The menus and property bar in the Styles Editor are similar to those in the regular WordPerfect screen, but features that cannot be added to styles are not included in the menus. For those features that are available, you access and insert format codes with the same menu choices or keystrokes that you do in a regular WordPerfect document.

2. Choose the font size from the property bar or from the Font dialog box.
3. Choose Italic from the property bar or from the Font dialog box.
4. Choose Right Justification from the property bar or from the menu (which you access by choosing Format, Justification, Right).
5. Type a quotation mark (").

   All the codes you see are those that begin the paragraph. WordPerfect automatically turns off these codes and reverts to the document codes at the end of the paragraph. However, you also want to close your paragraph with a quotation mark. Continue with the following steps.
6. Click Show 'Off Codes'. WordPerfect displays a separator button. Codes to the left of the button are those that begin the paragraph, and those to the right of the button are those that end the paragraph.
7. Position the cursor to the right of the separator button.
8. Type another quotation mark (").

TIP FROM

> If you're using WordPerfect's SmartQuotes, the Styles Editor inserts another opening quotation mark where you should have a closing quotation mark. Simply type any character, such as a space, before typing the quotation mark to get the proper closing quotation mark. Then delete the character, leaving only the closing quotation mark to close the paragraph.

9. Check your style settings one more time and then choose OK to save your style in your current document.

EDITING STYLES

To edit a paragraph or character style, access the Styles dialog box, select the style you want to edit, and click Edit. WordPerfect displays the Styles Editor dialog box, where you can make changes just as you do when you create a new style (see the preceding section, "Creating Styles").

TIP FROM

Instead of creating new styles from scratch, you can often save time by editing an existing style that's similar to the one you want to create. Simply give the style a new name and make any changes you want.

Editing DocumentStyle (the document initial style) follows a similar approach, but has a more far-reaching impact on your document. You can access the Styles Editor and view the DocumentStyle style in three ways:

- Choose File, Document, Current Document Style.
- Choose Format, Styles, and from the Available Styles list, select DocumentStyle and click Edit.
- Access Reveal Codes (by choosing View, Reveal Codes, or pressing Alt+F3). In the Reveal Codes window, double-click the Open Style: DocumentStyle button at the beginning of the document.

WordPerfect displays the Styles Editor dialog box (see Figure 9.15).

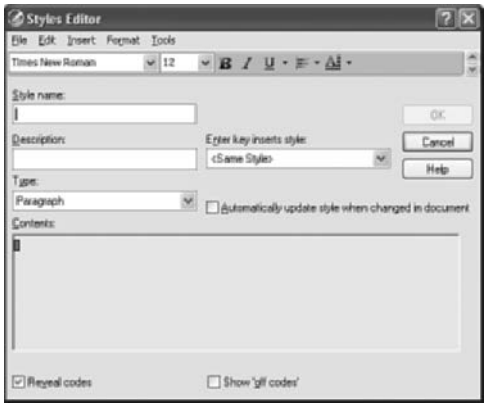

Figure 9.15
You can also use the Styles Editor to edit an open style, one that affects an entire document.

Out of the box, WordPerfect comes with certain preset styles. For example, by default, documents are in portrait orientation, have 1-inch margins on all sides, are singled-spaced, and have tab stops at every 1/2 inch. Note that none of these settings appear in the DocumentStyle. However, if you want to change the default settings, this is the place to do it.

To change the document styles for just the current document, edit the DocumentStyle style just as you do other styles. If you also want to make these changes the default for all your new documents, enable the Use As Default check box. WordPerfect then saves the Document Style information to your default template so that any new documents you create use these changed styles.

NOTE

Changes to the default template do *not* change the styles in documents that you have already created. Such changes apply only to new documents that you create after making the changes.

TIP FROM

A common problem WordPerfect users encounter is that they insert a formatting code, but find that it doesn't format everything they expect it to. For example, if you insert a margins code at the beginning of the document, that code affects the body of the text, but headers, footers, and footnotes all retain the original default margins. To ensure that a formatting code affects the entire document, change the settings in the DocumentStyle style.

SAVING STYLES

When you create or edit a style, that style is automatically saved in your current document. If you later open the document, the style is still there, available for your use. Unfortunately, custom styles are not automatically available to you in other documents or templates.

However, you can save your custom styles to WordPerfect's default template for use in all documents you create. You can also save a style to a custom template, one that you use only for a specific type of document (for example, a news release).

NOTE

When you save a style to another template, you actually *copy* the style from the current document to that template.

To save a style to the default WordPerfect template, follow these steps:

1. Open the document that contains the style you want to save.
2. Access the Styles dialog box by choosing Format, Styles or by pressing Alt+F8.
3. Select the style you want to save to the default template and choose Options, Copy. WordPerfect displays the Styles Copy dialog box (see Figure 9.16).

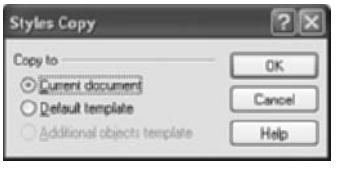

Figure 9.16
To save a style, copy the style to another document or template.

4. Choose Default template and then click OK.

WordPerfect now displays the style in the Available Styles list, with the notation that it's located both in the current document and also in a template as a template style.

Now, if you open a new blank document, your style appears in the style list. You can use the style as you do any other style.

The procedure for copying a style from your current document to another template is a bit more complicated, but only because there are more steps to follow:

1. Copy the style from your current document to the default template, as described in the preceding steps.

TIP FROM

If you want a custom style available to you in all your documents, including templates, you need not copy it to individual templates. By copying it to the default template, it is accessible from all your documents.

2. Choose File, New from Project; or press Ctrl+Shift+N to display the PerfectExpert dialog box (see Figure 9.17).

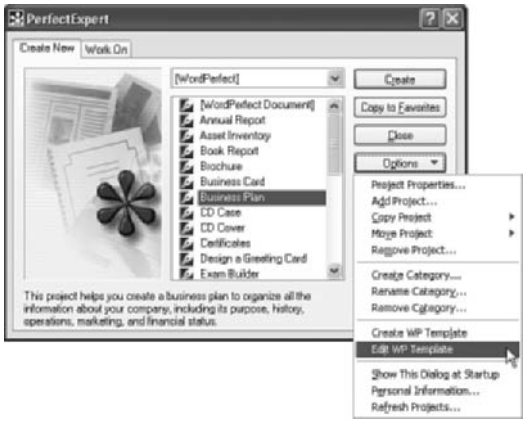

Figure 9.17
You can use the PerfectExpert dialog box to open a template file and then import styles to be used with the template.

3. From the Create New tab, select the template to which you want to copy your custom style.
4. Click Options, and select Edit WP Template. WordPerfect displays the WordPerfect editing screen, along with the template you are editing, and the Template toolbar (see Figure 9.18).

Figure 9.18
You can use the Template toolbar to copy styles and to save them with the current template document.

5. Click the Copy/Remove Object button on the Template toolbar. WordPerfect displays the Copy/Remove Template Objects dialog box, as shown in Figure 9.19.

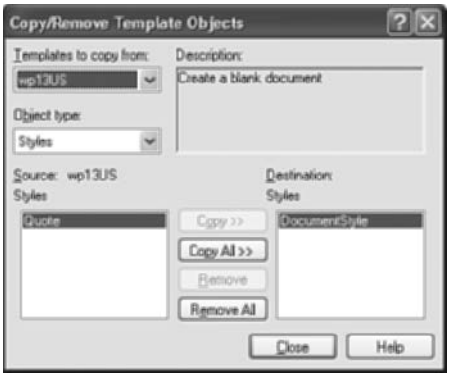

Figure 9.19
You can use the Copy/Remove Template Objects dialog box to copy styles from another document or template to the current document.

6. From the Templates to Copy From list, choose the default WordPerfect template, `wp13us`, if it isn't already chosen.
7. Select Styles from the Object Type drop-down list. WordPerfect displays your custom styles in the Styles list on the left side of the dialog box.
8. Click the style you want to copy, even if there's only one style listed, and click the Copy >> button to add it to the list of styles in the current template.
9. Click Close to return to the template.
10. Click the Close button on the Template toolbar and answer Yes when asked whether you want to save changes to the template.

Now, whenever you create a new document based on your edited template, your custom style is available to you, even if the style is later removed from your default template.

➔ If you need help working with WordPerfect templates, **see** Chapter 18, "Building Documents with Templates."

DELETING STYLES

If you create a style, it stays in the document unless you delete it. Sometimes you simply want to clean up your document and remove any unnecessary custom styles.

To remove a custom style from your current document or from the default template, follow these steps:

1. Access the Styles dialog box by choosing Format, Styles or by pressing Alt+F8.
2. Select the style you want to remove. Note the type of style it is, and whether it is a template style or in the current document only.
3. Click Options, and select Delete. WordPerfect displays the Delete Styles dialog box (see Figure 9.20), which includes all custom styles that can be deleted, whether from the current document or from the default template.

Figure 9.20
You can remove styles from the current document by using the Delete Styles dialog box.

NOTE

> You can remove only custom styles; you cannot delete system styles. If you choose a system style, the Delete option is grayed out and you cannot delete it.

4. Select the style or styles you want to delete.
5. Choose how you want to delete the style. You can delete the style by choosing one of these options:
   - **Including Formatting Codes**—This removes the style and the formatting it produces.
   - **Leave Formatting Codes in Document**—This removes the style, but replaces it with formatting codes that become part of the text, but that you must remove or format one by one, as you do with normal text.
6. Click OK to delete the style.

USING STYLES TOGETHER

You can increase the power of styles by linking them in the same document. For example, if you have a style that defines your company logo, you can nest that style in other styles used in newsletter headings, company letterhead, fax cover sheets, and so on. Then, if you change the logo style, it automatically updates other styles in which it is embedded.

To insert one style inside another, access the Styles dialog box, select the style in which you want to embed another style, and choose Edit. Then, in the Contents box of the Style Editor, choose Format, Styles and select a style to insert, and then click Insert.

NOTE

> Generally, styles that contain other styles should be document (open) styles because paragraph styles can be difficult to use. In any case, you cannot embed one paragraph style within another.

Styles that usually follow one another can be made to *chain*, or link, from one style to the next. For example, after you type a section heading, WordPerfect could automatically switch to the next style, such as a subtitle or a paragraph that begins with a drop cap.

To link two styles, follow these steps:

1. Access the Styles dialog box and select the first style you want to use.
2. Click Edit to display the Styles Editor dialog box.
3. In the Enter Key Inserts Style box, select the second style you want to use from the drop-down list of available styles (see Figure 9.21). Only custom styles appear; template and system styles do not.

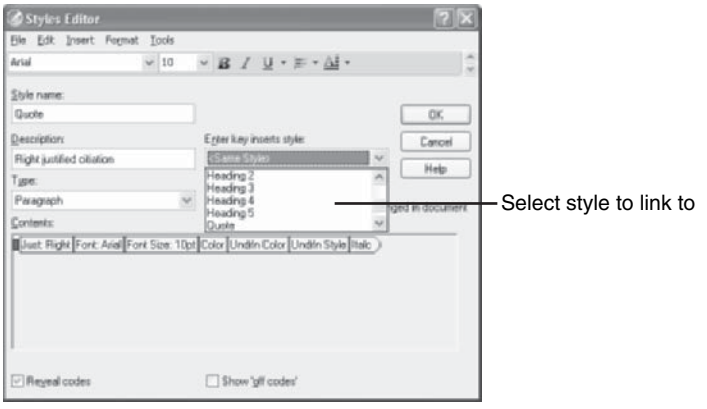

Figure 9.21
In the Styles Editor dialog box, you can choose to chain, or link, a style to another style.

4. Click OK to return to the Styles dialog box.
5. If you want to link the second style to a third style, repeat steps 1–4. Otherwise, click Close to save the linked styles in the current document.

NOTE

You cannot link from document (open) styles or from system styles.

TIP FROM

Don't forget that the default for all paragraph styles is to continue with the same style when you press Enter. If you want to turn off the style when you press Enter, you can choose `<None>` from the Enter Key Inserts Style box.

WORKING WITH STYLES FROM OTHER FILES

If you, or someone else, creates a document that contains styles you want to use, you might have to import those styles to your current document. For example, if you want to use a style that you know exists, but that doesn't show up on the Styles list, find the file or template, and then import the style and make it part of the current document.

To import styles from one file or template into a current document that doesn't have the styles, follow these steps:

1. Open the document that does not currently have the styles you want.
2. Access the Styles dialog box, click Options, and choose Retrieve. WordPerfect displays the Retrieve Styles From dialog box (see Figure 9.22).

Figure 9.22
To import styles from the WordPerfect system or from another template, use the Retrieve Styles From dialog box.

3. Use the Browse button to locate the file or template that contains the styles you want to retrieve and click Select.
4. You can choose to retrieve only user styles, only system files, or both. Click OK.
5. When asked whether you want to overwrite current style, answer Yes.

WordPerfect imports the style types you requested and adds them to the styles you already have in your current document. Save your current document to save the styles with that document.

TIP FROM

If you aren't sure about the styles you imported, you should check them out *before* you save your document. Also, you can always close the document without saving, which discards the imported styles.

TIP FROM

Another easy way to move a single style from one document to another is to open both documents and use Reveal Codes to copy the style code from the first document and paste the code into the second document. Note that if you're copying paragraph styles, you'll have to copy both the beginning and ending codes along with the text in between.

TROUBLESHOOTING

TOO MUCH UNINTENDED QUICKSTYLE

I tried to apply a QuickStyle to a heading, but applied it to a whole paragraph instead.

This can happen when you're trying to apply formatting by using the mouse. Simply click Undo on the toolbar or press Ctrl+Z. Then try it again.

CREATING A GLOBAL STYLE

I created a style, but now it doesn't appear on the list of available styles.

When you create a style, you save it in your current document only. If you want to make the style available for all your documents, you must copy the style to the default template. In the document that contains the style you want to copy, choose Format, Styles, and then select the style you want to copy. Click Options, and select Copy. Choose Default Template and click OK.

MISSING CUSTOM STYLES

I saved my custom style to the default template, but when I open my documents, that style doesn't seem to be available.

Styles saved to the default template are available only for newly created documents. You must import custom styles from your default template to the current document.

TOO MANY CHANGES

I wanted to change a bold, italic paragraph back to normal text, but when I did, other paragraphs changed, also.

You tried to change a paragraph style that automatically updates when you change the text. Instead, access the Styles drop-down menu on the property bar and select `<None>`, or delete the style codes in Reveal Codes.

PART III

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CHAPTER 10

Organizing Information with Tables

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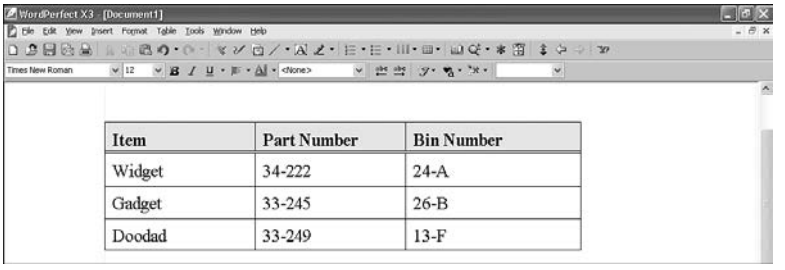
UNDERSTANDING TABLES

Of all WordPerfect's special features, the Table feature offers perhaps more practical uses and enables you to enhance the effectiveness and attractiveness of your documents more than any other. A *table* consists of rows and columns of data arranged and formatted to make the data easy to read or understand. For example, consider the WordPerfect table shown in Figure 10.1. Using WordPerfect's table formatting options, you can create any kind of table—from simple lists to complex invoices, from schedules to calendars, from programs to scripts, and more.



Item	Part Number	Bin Number
Widget	34-222	24-A
Gadget	33-245	26-B
Doodad	33-249	13-F

Figure 10.1
Even simple data lists look better and are easier to read in a WordPerfect table.

The structure of a table is very much like the structure of a spreadsheet, and in fact, you can even use WordPerfect tables for spreadsheet functions. In a table, WordPerfect labels the rows with numbers (1, 2, 3…) and the columns with letters (A, B, C…). The intersection of a column and a row is a cell. You identify each cell according to the row and column in which it resides (A1, B3, C14, and so on). In Figure 10.1, for example, the word Widget is in the first column (A) and the second row (2); therefore, Widget is in cell A2.

➔ For information on WordPerfect's table spreadsheet capabilities, **see** "Using Spreadsheet Formulas in Tables," **p. 366**.

PLANNING TABLES

Before you actually create a table, you can save a great deal of time by doing some preliminary planning. First, ask yourself what you want to accomplish with your table. Do you merely want to present straightforward information more clearly, or do you want to design a more complex, heavily formatted form?

Next, determine the approximate number of rows and columns you want. You can have up to 64 columns and 32,767 rows (or 2,097,088 cells), although it's unlikely you'll ever use that many. You do not need to know the exact number of rows or columns because you can add or insert them while you work with your table. Knowing this information in advance, however—especially the number of columns—can make creating, modifying, and using your table much easier.

Finally, consider the number and placement of tables. You might need to place two tables of dissimilar structure one after the other, rather than try to create just one table. Also, you might need to place two tables beside each other, in which case you might want to use columns or graphics boxes.

CREATING TABLES

After you determine the number of rows and columns you want, you create WordPerfect tables with one of two easy methods: using the menus or using the toolbar.

To use the menus to create a table, follow these steps:

1. Position the insertion point in your document where you want to insert a table.
2. Choose Table, Create, or press F12. WordPerfect displays the Create Table dialog box (see Figure 10.2).

Figure 10.2
The Create Table dialog box lets you specify the number of columns and rows you want in your table.

3. Type the number of columns and the number of rows you want.
4. Click Create to create the table (see Figure 10.3).

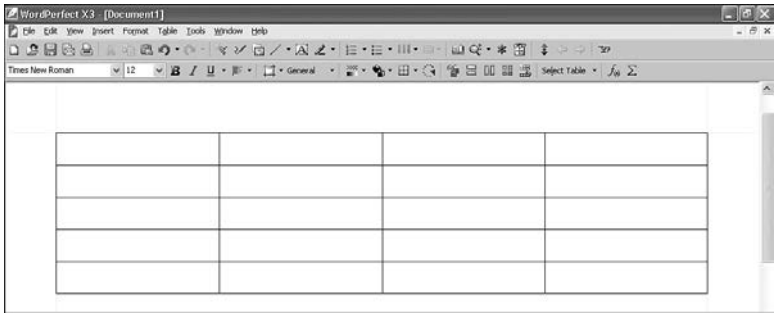


Figure 10.3
A simple table with four columns and five rows: Notice that the columns are evenly spaced and extend from margin to margin, and the property bar shows table-specific functions.

TIP FROM

The Drag to Create a New Table option is particularly useful if you need to place two tables side by side. Simply create each table separately, positioning them next to each other.

NOTE

> The Drag to Create a New Table option in the Create Table dialog box enables you to create a table inside a text box. You drag the area where you want the text box, and then WordPerfect inserts the table you specify in the dialog box. After the table is created, you can work with it as described in this chapter. Choosing this option makes it the default until you deselect it.

➔ For more information on creating and manipulating text boxes, **see** "Adding Text Boxes As Graphic Objects," **p. Web:14**.

To create the same table by using the toolbar, follow these steps:

1. Position the insertion point in your document where you want to insert a table.
2. Click the Table QuickCreate button, and hold the mouse button down to display a grid.
3. Drag the mouse down and to the right until the pop-up grid highlights the number of columns and rows you want (see Figure 10.4). If you need more columns or rows than are displayed on the grid, keep dragging the mouse; WordPerfect expands the grid until it is up to 32 columns by 45 rows. At the top of the grid, WordPerfect specifies the number of columns and rows, in that order, that you have selected.

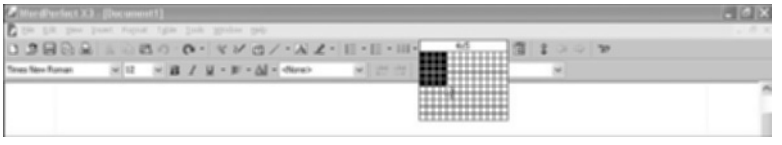
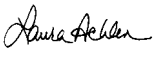


Figure 10.4
Using the Table QuickCreate button on the toolbar, you click and drag the mouse to select the number of rows and columns you want in a table.

4. After you have displayed the number of columns and rows you want, release the mouse button. WordPerfect creates the table with the number of columns and rows you indicated.

TIP FROM



> If you decide you don't want to create a table, simply drag the mouse pointer to the top of the grid and when No Table appears, release the mouse button. Or, go ahead and create the table. Then click the Undo button or press Ctrl+Z to remove it.

NOTE

> If you selected Drag to Create a New Table in the Create Table dialog box, you can also drag to create using the QuickCreate button. After you choose the number of rows and columns, you click and drag the area where you want to place your table. To turn off this option, choose Table, Create and disable the Drag to Create a New Table check box.

TOOLS FOR WORKING WITH TABLES

The most obvious tool for working with tables is the Table menu. Additional help is also available on the QuickMenus and on the table property bar.

With the insertion point located inside a table, choose Table from the menu to find most of the table-related options you're likely to need. You can also quickly open a menu of options by right-clicking on a table. The Table QuickMenu is nearly identical to the regular Table menu (see Figure 10.5).

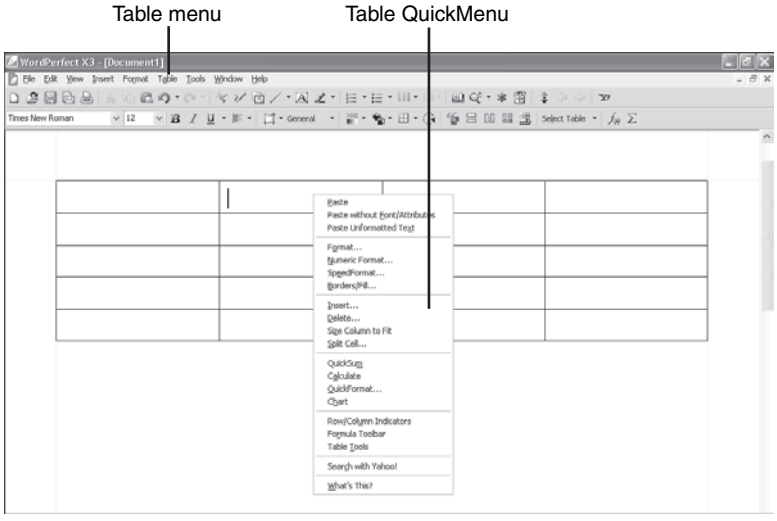


Figure 10.5
The Table QuickMenu is nearly identical to the one you find on the Table menu.

NOTE

> If the insertion point is located anywhere outside the table, the property bar does not display table-related options. Likewise, most options on the Table menu are not available. Also, if you right-click outside the table area you will not get the table-related QuickMenu.

USING SPEEDFORMAT

By default, all the cells in a WordPerfect table are surrounded by single lines, and the table has no border. You can customize the lines and borders of a table, and WordPerfect's SpeedFormat feature makes it easy to modify the look of your table.

If you create the table using the menus, you can choose the SpeedFormat feature from the Create Table dialog box (refer to Figure 10.2). If you have already created a table, you can position the cursor anywhere inside the table and choose SpeedFormat from the Table drop-down menu on the property bar, or from the Table QuickMenu. WordPerfect then displays the Table SpeedFormat dialog box (see Figure 10.6, which shows a style already selected).

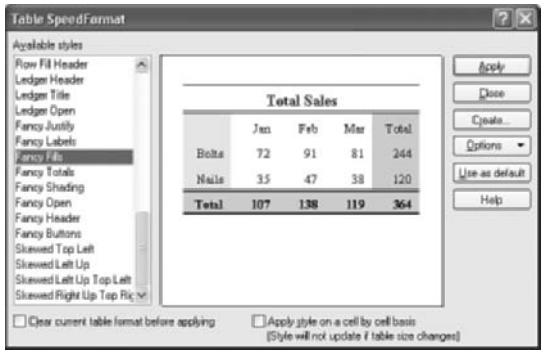


Figure 10.6
When you select a SpeedFormat style such as Fancy Fills, you apply a predefined set of formats, lines, and fills to your table.

10

The Available Styles list box lists several predefined table formats. When you click a style, WordPerfect displays a sample table in the preview box. For example, if you select the Fancy Fills style, WordPerfect formats your table with a centered title bar and with shading and line changes to set off the data (refer to Figure 10.6).

CONVERTING TABULAR COLUMNS TO TABLES

You might have existing text that you want to place in a table, but you don't want to retype that text. Fortunately, WordPerfect provides a simple method for creating a table from text that is formatted in tabular columns. In fact, this capability might be the easiest yet most practical use for tables.

Suppose that you have a list of company employees that includes names, offices, and telephone numbers. The three columns of data are separated by single tabs, as follows:

Prochniak, Mary	VH279	7-1408
Pflug, Martin	VH246	7-4965
Murphy, Dianna	VH299	7-6543

To convert data in tabular columns to a table, follow these steps:

1. With the mouse or keyboard, select all the text to the end of the last line of data. Don't include the final hard return, or you'll end up with an extra row in your table.
2. Choose Table, Convert, or press F12. WordPerfect displays the Convert: Text to Table dialog box (see Figure 10.7). Alternatively, you can click the Tables QuickCreate button on the toolbar and choose Tabular Columns from the drop-down list.
3. Choose Tabs (the default) and any other options you want, and click OK. WordPerfect converts your tabular columns of data into a table (see Figure 10.8).

Although this procedure is easy, the key to successfully converting tabular columns to a table lies in the format of the original text. You should use tab settings for each column so that only one tab separates each column of data. If, for example, you use WordPerfect's default 1/2-inch tab settings and use more than one tab to separate some of the entries, WordPerfect adds extra cells in the table for the extra tabs. The result can be quite messy.

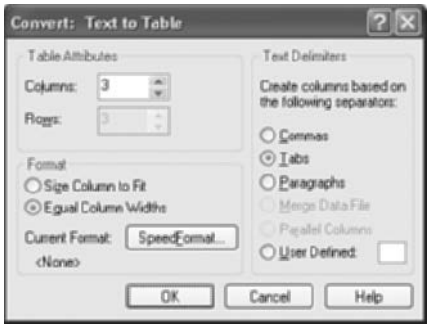


Figure 10.7
The Convert: Text to Table dialog box is used for converting pre-existing data to a table.

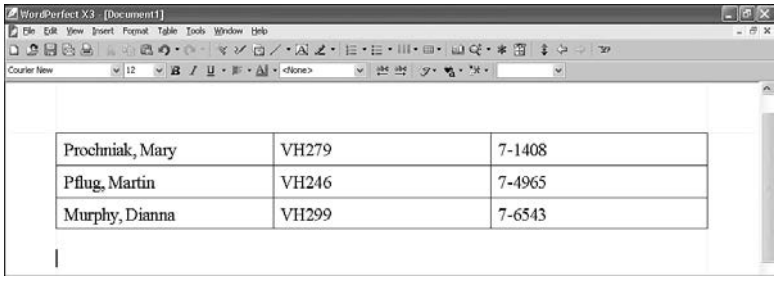


Figure 10.8
After converting data from tabular columns into a table, you might need to use column width and other formatting to adjust the layout of the data.

CONVERTING TABLES TO OTHER FORMATS

Sometimes you don't want your table data in table format. For example, you need to export the information to a format that can be used in a non-WordPerfect database.

To convert table data to another format, position the insertion point in the table and choose Table, Convert. WordPerfect displays the Convert: Table to Text dialog box, shown in Figure 10.9.

Figure 10.9
The Convert: Table to Text dialog box enables you to convert table data into other formats.

You can convert the data in two ways:

- You can separate the data from each cell in a row with commas, hard returns, tabs, or with any other character you specify. Note that rows of data are separated by hard returns.

- You can change the data into a WordPerfect merge file format, where each cell is separated by an ENDFIELD code and each row is separated by an ENDRECORD code.

➔ For information on working with WordPerfect data in other programs, **see** Chapter 13, "Importing Data and Working with Other Programs."

WORKING WITH TABLES

If you thought it was easy to create a table, you'll find it even easier to work with the information you place in tables. Consider each table cell a miniature document with its own margins and formatting. As you enter text, WordPerfect wraps the words within the cell, vertically expanding the row to accommodate what you type (see Figure 10.10). You can enter and edit text in a cell just as you do in a document.

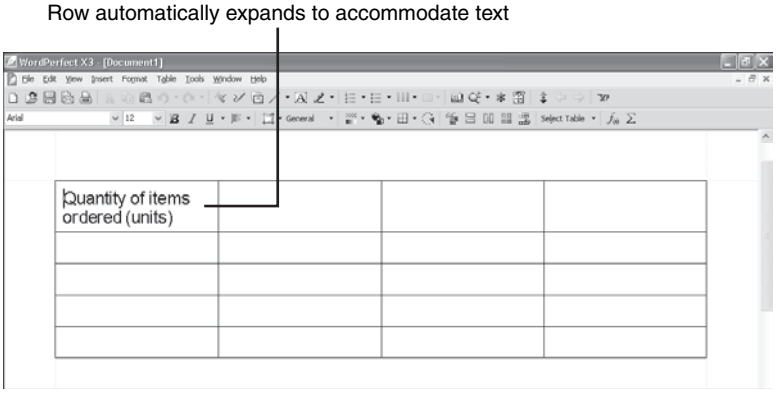


Figure 10.10
A table cell can contain more than one line of text. A table row will be as tall as the tallest cell.

MOVING AROUND IN A TABLE

When you first create a table, WordPerfect positions the cursor at the upper-left corner of the table, in cell A1. Notice that the General Status indicator, on the application bar at the bottom of the screen, displays the name of the current table (Table B in this case) and the cell location of the cursor, Cell A1 (see Figure 10.11). When you move the cursor to a new cell, WordPerfect indicates on the status bar the location of the new cell.

Figure 10.11
When the cursor is located within a table, WordPerfect displays the current cell location on the application bar.

To quickly move to any cell in a table, just click in the cell. To move the cursor one cell to the right, press the Tab key. To move the cursor one cell to the left, press Shift+Tab.

Note that if the cursor is in the last cell of a row, pressing Tab moves the cursor to the first cell of the next row. Pressing Shift+Tab while the cursor is in the first cell of a row moves the cursor to the last cell of the previous row. When you reach the last cell of the last row of your table and press Tab, WordPerfect adds a row and advances the cursor to the first cell of the next row.

Finally, pressing Home twice takes you to the leftmost column in the row; pressing End twice takes you to the rightmost column in a row.

➔ For more information on how to insert or delete rows and columns in a table, **see** "Changing Table Size," **p. 262**.

USING QUICKFILL

The idea behind WordPerfect's QuickFill feature is that WordPerfect can examine the first few entries in a series and automatically determine the pattern that is being used. WordPerfect then fills in the remaining blank cells in the series based on that pattern.

WordPerfect can automatically insert such things as numbers, days, months, and so on. To use QuickFill to automatically fill in table cells, follow these steps:

1. Type the data you want in the first one or two cells. For example, type **`Mon`** and **`Tue`** at the top of the first two columns.
2. Select the cells you want filled, including the first two you already typed (see Figure 10.12).

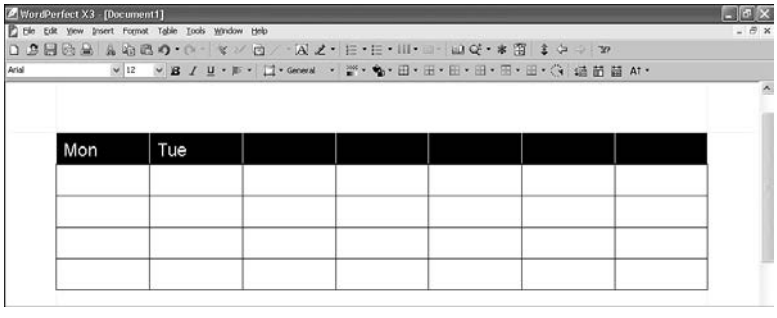


Figure 10.12
You can select a sequence of cells and several blank cells, and use QuickFill to fill in the missing data.

3. Choose QuickFill from the Table menu or from the Table QuickMenu. WordPerfect automatically supplies the remaining information (see Figure 10.13).

Some of the series that QuickFill can complete for you include the following:

- **Numbers**—For example, 1, 2, 3… or 5, 10, 15…
- **Days**—For example, Monday, Tuesday, Wednesday… or Mon, Tue, Wed…
- **Months**—For example, Jan, Feb, Mar…

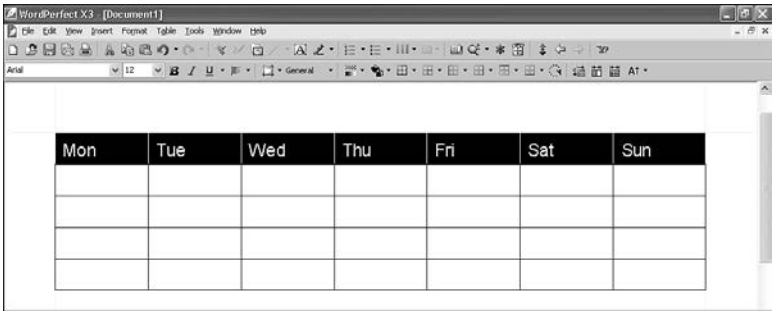


Figure 10.13
QuickFill knows how to fill in the remaining cells in a series.

Most series can be completed by QuickFill if you type the first one or two items. In some situations, you'll need to provide more entries so QuickFill can discern a pattern. If you supply information that WordPerfect cannot extrapolate, it simply repeats the cells that contain information across the remaining selected cells.

SELECTING TEXT AND CELLS

Within a single cell, you select text the same way you do in a document—by using the mouse or the keyboard.

If you cross a cell boundary while selecting, WordPerfect begins selecting entire cells. For example, if you click the mouse in the middle of the text in cell A1 and begin dragging the mouse toward cell B1, WordPerfect highlights just the text until the mouse pointer crosses over into cell B1. At that point, the entire cells (A1 and B1) are highlighted and the mouse pointer changes to an arrow (see Figure 10.14). As you continue to drag the mouse to other cells, these cells also become part of a selected block.

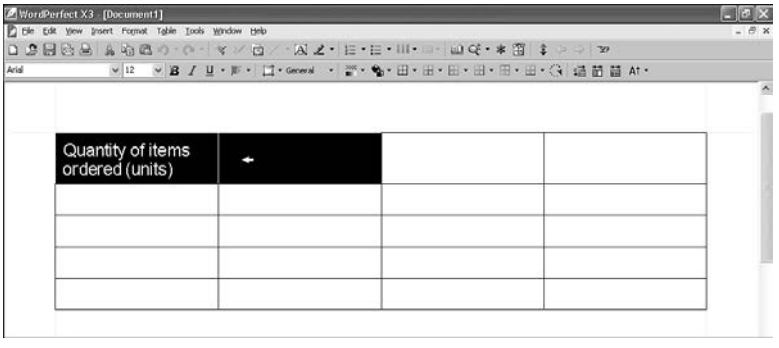
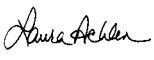


Figure 10.14
You can select entire cells by dragging the mouse pointer across the edge of the cell until the pointer turns into an arrow. Continue dragging the pointer across cells to select multiple cells at once.

TIP FROM



To select only part of the text from more than one cell, without selecting an entire cell, press the Select key (F8) and then use the arrow keys to precisely select the text you want.

You can use this method to select rows of cells, columns of cells, and entire tables of cells. However, to select a single cell, you position the mouse pointer within the cell you want to select and move the pointer slowly toward the left line of the cell until the pointer changes to a single arrow. This arrow indicates that you are about to select cells rather than just contents. Click once to select the cell. Click twice to select the entire row of cells. Click three times to select the entire table. To select a column, move the pointer toward the top line of any cell in the column until the pointer turns into a single upward-pointing arrow. Click once to select the cell, twice to select the column, and three times to select the entire table.

NOTE

While the insertion point is inside a table, you will see the Select Table button on the property bar. Click the button's drop-down menu to select an entire table, column, or row.

If you've been having trouble with selected cell text moving where you don't want it, see "But I Didn't Want That There!" in the Troubleshooting section at the end of this chapter.

TIP FROM

If you choose Table, Row/Col Indicators to display the row and column indicators at the edge of the screen, you can click the number of a row or the letter of a column to select an entire row or column.

DELETING TEXT FROM CELLS

To remove text from within a single cell, you use the Delete and Backspace keys as you do with any other text.

A quicker and easier method for deleting the contents of entire cells, especially if the cell contains a large amount of text, is to select an entire cell using the method described in the preceding section. Then press Backspace or Delete, and WordPerfect removes the entire contents of the cell. Don't forget to use Undo if you accidentally delete the contents of a cell.

You can use the same method for deleting the contents of an entire row, column, or table. However, because this can be a bit more destructive, WordPerfect displays a dialog box asking exactly what you want to delete. For example, if you select all of Row 1 and press Delete or Backspace, the Delete Structure/Contents dialog box appears, with Rows selected (see Figure 10.15). If you click OK, you actually remove the entire row from the table. If you choose Cell Contents Only, and then click OK, only the contents of that row are removed; the row itself remains.

Figure 10.15
The Delete Structure/Contents dialog box enables you to delete the contents of cells or entire rows or columns.

If you select and attempt to delete all the cells in the table, WordPerfect offers several options in the Delete Table dialog box (see Figure 10.16). If you choose Table Contents Only, then just the text and figures will be removed; the table structure and formatting remains intact. If you choose Formulas Only, then only the formulas will be stripped out. If you choose Convert Table Contents, you'll get the Convert Table to Text dialog box (refer back to Figure 10.9).

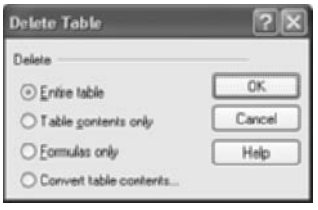


Figure 10.16
The Delete Table dialog box enables you to delete the entire table, remove all the data from the table, remove formulas only, or convert the table to another format.

CUTTING, COPYING, AND PASTING TEXT IN TABLES

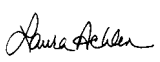
You can cut, copy, and paste text to and from table cells the same way you do in text documents.

By selecting entire cells, you can quickly and easily cut or copy all the text along with its formatting to a new location. For example, suppose that you want to copy all of Row 1 to Row 2. Select the entire row and then choose Cut or Copy, and the Cut or Copy Table dialog box appears (see Figure 10.17).

Figure 10.17
You can use the Cut or Copy Table dialog box to cut and paste entire rows, columns, or groups of cells.

Now you can choose to move the current selection (the contents, but not the table structure), the entire row (the contents and the structure), or the entire column. To cut the entire row, select Row, and then click OK. Position the cursor where you want to paste the row, and choose Paste to insert the row at the insertion point.

TIP FROM



One of the best uses for the drag-and-drop method of cutting and pasting is when you need to move table cells, rows, and columns from one location to another. After selecting the cells you want to move, simply use the mouse to drag the selection to the new table location and release the mouse button.

DELETING, CUTTING, AND COPYING TABLES

To delete, cut, or copy an entire table, including its structure, select the table from the first cell to the last cell; then delete, cut, or copy the table.

To restore a deleted table, you can use Undo (Ctrl+Z). If you cut or copied the table, you can paste it in the new location.

SAVING AND PRINTING TABLES

A table is always part of a document, even when the table is the only element in the document. The procedure for saving tables, therefore, is exactly the same as the method for saving documents.

If you want to save a table alone, or just part of your table, first select the table or the cells you want to save, and then choose File, Save As (or press F3). WordPerfect asks whether you want to save the entire file or just the selected text. If you choose Selected Text and provide a filename, WordPerfect saves just the selected cells, along with their format and contents, in a new, separate file.

Also, you print tables the same way you print other kinds of text. If you print using a dot-matrix printer, you might want to turn off table lines to speed printing. However, table lines do not significantly affect printing speed on inkjet or laser printers.

➔ For more information on saving a WordPerfect document, **see** "Saving Documents," **p. 23**.
➔ For information on printing, **see** Chapter 6, "Printing, Faxing, and E-Mail."

EDITING TABLE STRUCTURE

When you create a WordPerfect table, certain default settings apply:

- Evenly spaced columns and rows
- No special formatting of the contents of the cells
- Single lines that separate the cells of the table
- No special border around the table
- Full-justified tables (the tables themselves extend from margin to margin)

The real beauty of the Table feature is that you can easily make all kinds of adjustments to these default settings. When you make changes to the shape and size of table cells, columns, and rows, you are editing the layout of the table, or the table structure.

WordPerfect offers several methods for changing the layout of tables: the Table menu, the property bar, the Table QuickMenu, the mouse, and the ruler bar.

➔ For details on table editing tools, **see** "Tools for Working with Tables," **p. 251**.

TIP FROM

Don't forget that in order to use table-editing tools, you first need to position the cursor somewhere inside the table.

CHANGING COLUMN WIDTHS

Often, instead of evenly spaced columns, you need a table with columns of unequal width. To quickly change the width of a column, position the mouse pointer directly on the line separating two columns until the pointer changes into a double-headed arrow (see Figure 10.18). When you click and hold down the mouse button, WordPerfect displays a dotted guide that helps you position the new column margin. Notice that a QuickTip box also appears, displaying the exact widths of the column to the left and the column to the right. Simply drag the column divider right or left until you have the desired width.

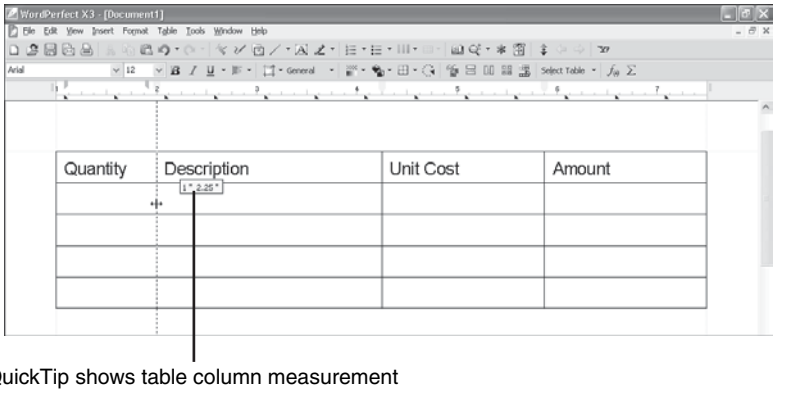
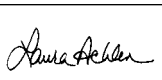


Figure 10.18
You can change column widths by dragging the column divider with the mouse.

TIP FROM



Don't forget that Undo can be very useful as you experiment with table adjustments.

You can perform the same task by dragging the column markers on the ruler bar (see Figure 10.19). Notice that the status bar also displays the exact position of the column separator line: Position: 4.25.

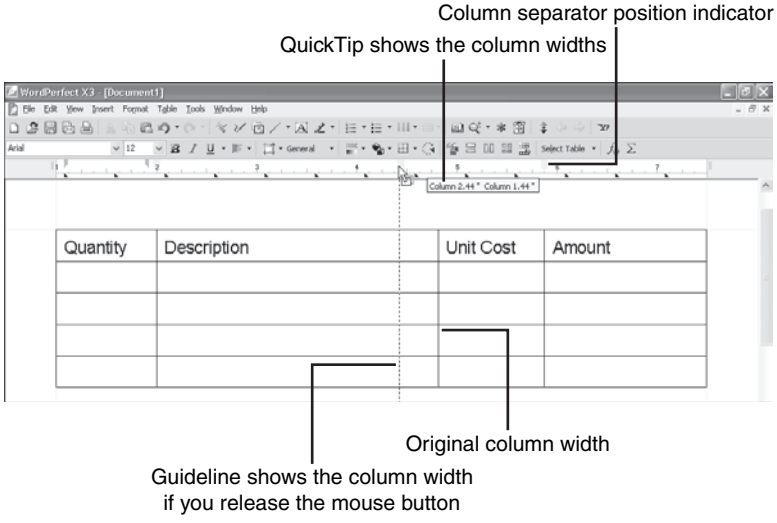


Figure 10.19
You can use the mouse to drag the inverted triangles on the ruler bar to size your table columns.

TIP FROM

To change column widths proportionally, hold down the Shift key while moving the column separators. For example, in a four-column table, hold down Shift and drag the line between Columns A and B to the right to resize the three columns to the right. Notice how the columns to the right are resized evenly. Note that if the column widths were not all the same size, they will still vary. The resizing merely subtracted the same amount of width from all of the columns to the right, not just the immediate column to the right (as it would without the Shift key).

Adjusting column width in this manner is not very precise, but if you already have text in the columns and can see that the columns are wide enough, or if the measurements don't really matter, this method is quick and easy.

Sometimes you simply want to be sure that the columns are wide enough to display each cell's information on one line (for example, a list). To adjust a column's width to fit the text in its cells, position the cursor in the column you want to adjust, and from the Table menu or the QuickMenu choose Size Column to Fit. Columns adjusted in this manner expand to the right, thus reducing the width of columns to the right.

If you want exact column measurements, position the cursor in any cell of the column you want to adjust and from the Table menu or the QuickMenu, choose Format (you can also press Ctrl+F12). WordPerfect displays the Properties for Table Format dialog box (from this point forward, we'll call this simply the Table Format dialog box). Click the Column tab (see Figure 10.20).

Figure 10.20
The Table Format dialog box is used for formatting table columns, as well as tables, table rows, and table cells.

In the upper-right corner of the dialog box, type the measurement you want in the Width box. Also, choose Always Keep Width the Same to prevent proportional sizing of columns from affecting this particular column.

TIP FROM

You can specify the column width measurement in decimals (the default unit of measurement) or in fractions of an inch, such as 1 5/16. Other units of measurement include centimeters (2.55cm = 1 inch), points (72p = 1 inch), or WordPerfect units (1200w = 1 inch). WordPerfect automatically converts these measurements into the default measurement type you are using. This works anywhere that requires a measurement.

CHANGING TABLE SIZE

After you create a table, you often discover that it has too many or too few columns or rows. You learned earlier how to add rows at the end of a table by pressing Tab while in the last cell of the table. You can also insert or delete rows or columns at any location in the table.

To add rows to your table, position the cursor where you want the new row or rows and from the Table menu or the QuickMenu choose Insert. WordPerfect displays the Insert Columns/Rows dialog box (see Figure 10.21).

TIP FROM

The easiest and quickest way to insert a single row before the current cursor position is to press Alt+Insert. You can also click the Insert Row icon on the property bar.

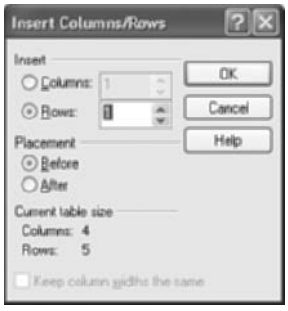


Figure 10.21
The Insert Columns/Rows dialog box enables you to add rows or columns to your table.

By default, WordPerfect assumes that you want to insert a single row preceding the current cursor position. Choosing Before inserts the specified number of rows or columns at the location of the cursor, pushing the rows down or columns to the right to make room for the new rows or columns. Choosing After adds another row or column following the location of the cursor. This option is particularly useful when adding columns at the right of the table.

NOTE

> Keep in mind that columns or rows you add or insert assume the special formatting attributes—such as lines and text formats—of the column or row that is selected when you choose Insert.

To decrease the size of a table, you can delete rows or columns. Position the cursor in the first row or column you want to delete, and from the property bar Table menu (or from the QuickMenu) choose Delete. From the Delete Structure/Contents dialog box, which is similar to the Insert Column/Rows dialog box (refer to Figure 10.21), specify the number of columns or rows you want to delete and click OK. The Delete dialog box also enables you to delete the contents of only specified rows or columns.

TIP FROM

> The easiest and quickest way to delete a single row at the current cursor position is simply to press Alt+Delete.

JOINING AND SPLITTING CELLS

If you use a table for complex purposes, such as a form, you often need cells of varying sizes. You can join and split cells to create such cells.

To join two or more contiguous cells (for example, all the cells along the top row of a table), simply select the cells you want to join and from the Table menu choose Join, Cell; or from the QuickMenu, choose Join Cells. WordPerfect joins the cells, which now appear as one large cell. Figure 10.22 shows an invoice title added after joining the cells.

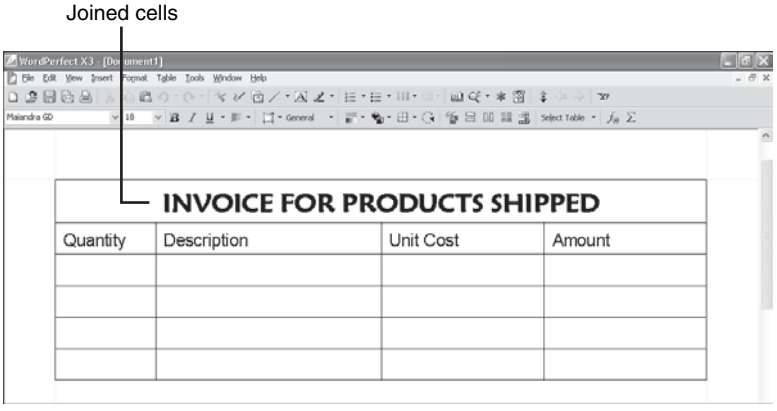


Figure 10.22
You can join several table cells—for example, all the cells in the first row—making them one large cell across the top.

You can use this method to join any number of cells in rows, columns, or blocks. Joined cells become one cell, occupying the space formerly occupied by the individual cells.

TIP FROM

You can use the QuickJoin button on the property bar to quickly join cells. Simply click the QuickJoin button and then select the cells that you want to join. To quickly select the cells, hold down the Shift key and drag across the cells to be joined. Click the QuickJoin button again to turn this feature off.

WordPerfect also enables you to split a cell into two or more cells. To split a cell, follow these steps:

1. Position the cursor in the cell you want to split.
2. From the Table menu choose Split, Cell; or from the QuickMenu choose Split Cell. WordPerfect displays the Split Cell dialog box (see Figure 10.23).

Figure 10.23
The Split Cell dialog box enables you to split a cell into two or more rows or columns.

Indicate the number of columns or rows you want to divide the cell into, and click OK. You can further divide split cells as much as you need to. However, splitting a cell into additional rows also expands the other cells in the same row to accommodate the size of the split cell.

You can split and join cells even more quickly by using the QuickSplit and QuickJoin features, which enable you to use the mouse to visually split and join cells. To use QuickSplit to split cell columns, follow these steps:

1. From the Table menu, choose Split, QuickSplit Column, or more easily, click the QuickSplit Column button on the Properties toolbar. WordPerfect changes the mouse pointer as shown in Figure 10.24, and also displays a dashed line and QuickTip measurements that indicate where the split will occur.

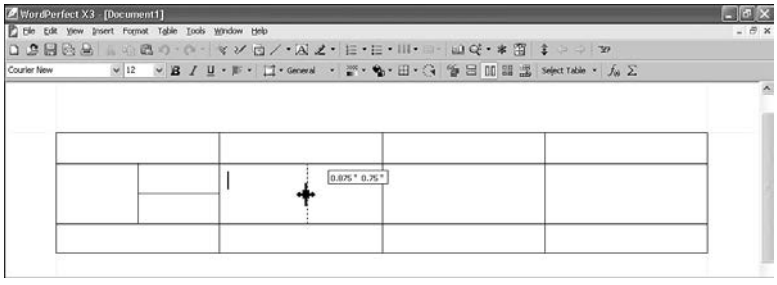


Figure 10.24
You can use QuickSplit to quickly split cells into columns or rows.

2. Position the mouse where you want the split to occur and click the mouse.
3. Split the same cell or other cells as needed.
4. Turn off QuickSplit by clicking the QuickSplit Column button once again.

You can also use QuickSplit to split cells by rows. Choose Table, Split, QuickSplit Row, or more easily click the QuickSplit Row button on the Properties toolbar and follow the same procedures just described. Be sure to click the button again to turn it off.

If you want to split both rows and columns at once (that is, two rows, two columns), choose Table, Split, QuickSplit Row/Column, or click the QuickSplit Row/Column button on the Properties bar. Click it again to turn off this option. Note that although you can vary the width of the split columns, WordPerfect automatically splits a row into two rows of equal height.

CHANGING ROW STRUCTURE

WordPerfect automatically determines the amount of vertical space in a row based on the amount of text in its cells. The cell requiring the most vertical space sets the height for the entire row.

TIP FROM

If the cell row seems too high, check to see whether you have an extra hard return in any of the cells in that row. Delete the hard return and the row will return to its normal height.

You can easily and quickly change a row's height by dragging the bottom line of the row up or down. WordPerfect displays a QuickTip showing the size the row will become when you release the mouse button.

Sometimes you need to set a specific row height, either to limit the amount of text you can enter into the row's cells or to make sure that a row contains a minimum amount of space, regardless of whether the cells contain data. A good example of the latter situation is a calendar in which you might want a fixed row height, regardless of the number of events on any given day. To fix row height, follow these steps:

1. Open the Table Format dialog box (by choosing Format from the QuickMenu or from the Table menu, or by pressing Ctrl+F12).
2. Click the Row tab. WordPerfect displays options for formatting a row (see Figure 10.25).

Figure 10.25
To format an entire row of cells, click the Row tab in the Table Format dialog box.

3. In this dialog box you set the row height and the number of lines of text per row. Although the options don't appear related in the dialog box, you can combine row height and lines of text per row in these ways:
   - **Automatic and Multiple Lines**—This combination, the default, automatically adjusts the row height to accommodate as many lines as necessary.
   - **Fixed and Multiple Lines**—This combination uses a fixed height and enables you to enter multiple lines, but only up to the specified height. You use this combination when you create a calendar, for example.

     Make sure that any fixed height you select is high enough to accommodate at least one line of text. Otherwise, text that might appear onscreen will not print.
   - **Automatic and Single Line Only**—This combination automatically adjusts the row height to accommodate a single line of text, regardless of the text's height (font size). If you choose these options and press Enter while entering text in your table, the cursor automatically advances to the next cell.

- **Fixed and Single Line Only**—This combination maintains a fixed height but enables you to enter only one line of text. The font size for that line of text must be small enough to fit into the specified row height.
- **At Least**—This, along with Multiple or Single line options, guarantees that the row will be a minimum height, but can expand if necessary to accommodate extra text.

4. Type the amount of space you want (for example, 1-inch fixed height for a calendar row), and click OK.

By default, WordPerfect does not allow rows that contain multiple lines to span printed page breaks. This can create problems if you have rows with an unusually large number of lines, because you end up with large blank spaces at the bottom of the page. Some tables even contain so much text that a row exceeds the height of the entire page! To avoid these problems, simply choose Divide Row Across Pages in the Row Attributes section.

CREATING HEADER ROWS

Because a table can consist of up to 32,767 rows, it might span several pages. If you create a long table, you might want certain information (such as column headings) to repeat at the top of each page. Such rows are called header rows. To create a header row, follow these steps:

1. Position the cursor in the row you want to designate as a header row.
2. Open the Table Format dialog box, and click the Row tab (refer to Figure 10.25).
3. Choose Header Row (Repeats on Each Page).
4. Click OK.

WordPerfect displays an asterisk (*) next to the cell reference in the general status area of the application bar (for example, Cell A1*) to indicate that the row is a header row.

NOTE

> Header rows don't have to begin with the first row, but if you want more than one header row, the rows you specify must follow one another.

CREATING SKEWED ROWS AND COLUMNS

Tables often require header rows where text doesn't quite fit horizontally. Although you can rotate text (see the section "Formatting Cells," later in this chapter), you can enhance the readability of your table by using skewed, or angled, cells and text.

The table shown in Figure 10.26 includes both a skewed row and a skewed column. Don't forget that you can repeat header rows, including skewed rows, at the top of each page. In the Table Format dialog box, click the Rows tab and then select Header Row. To skew table rows or columns, follow these steps:

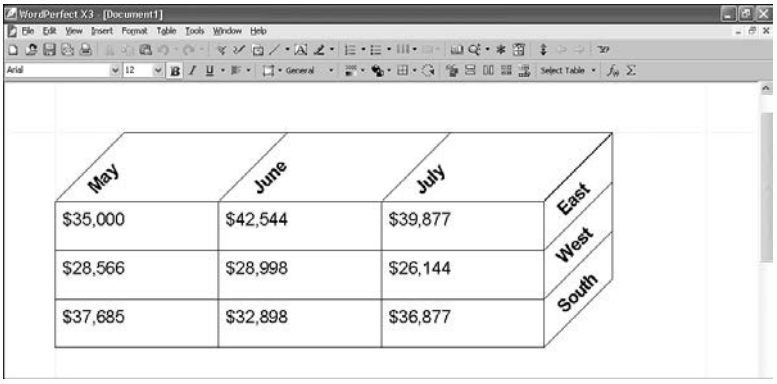


Figure 10.26
You can skew the cells in the top row, or in the left or right columns, along with the text they contain. You can also join skewed corners for a cleaner look.

1. Open the Table Format dialog box (press Ctrl+F12) and then click the Skew tab (see Figure 10.27).

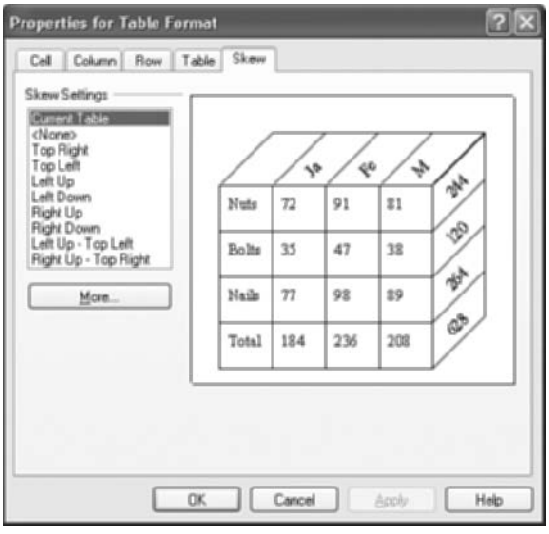


Figure 10.27
You can use the Skew tab of the Table Format dialog box to skew rows or columns.

2. Click any of the available Skew settings. The preview box displays the effect of the skew style.
3. When you are satisfied with the skew settings, choose Apply, then OK.

TIP FROM

You can customize the skew settings in the Edit Skew dialog box. Choose More in the Skew tab of the Table Format dialog box.

FORMATTING TABLE TEXT

The preceding section focuses primarily on features that help you create the layout, or structure, of a table. It is also important that you make sure that the text itself contributes to the effectiveness of your presentation. Therefore, you need to understand how text attributes and text alignment apply to table cells.

UNDERSTANDING FORMATTING PRECEDENCE

Each time you choose a text formatting option, you have to consider whether that attribute should apply to the entire table, to a column, or to a cell or group of cells. Whether a change you make affects a cell depends on formatting priority. Changes you make to a specific cell or group of cells have precedence, or priority, over changes you make to rows and columns. Changes made to cells or to rows and columns have precedence over changes made to the entire table.

Suppose, for example, that you specify that the data in a single cell should be centered (the heading of a column, for example) and then specify that the data for the entire column should be decimal-aligned. The change made to the column has no effect on the center-alignment change you make to the individual cell.

Keep this in mind, especially as you format rows and columns. Any changes to a cell you might have made (and forgotten about) are not changed when you specify something different with column or table formatting.

FORMATTING TEXT IN COLUMNS

To modify the text formatting of all the cells in a column, position the cursor in the column you want to format, open the Table Format dialog box, and click the Column tab. WordPerfect displays the dialog box controls for formatting columns (see Figure 10.28).

Figure 10.28
To format columns, use the Column tab in the Table Format dialog box.

TIP FROM

To format several adjoining columns simultaneously, select cells on the same row from all the columns you want to include. Then open the Table Format dialog box and click the Column tab.

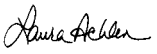
Perhaps one of the most commonly needed column formats is the horizontal alignment of text, which you change in the Align Contents in Cells area of the Table Format dialog box. Choose from the following options:

- **Horizontal**—Use the drop-down menu to choose Left, Right, Center, Full, All or Decimal Align alignment.

➔ For a complete description of text alignment types, **see** "Justifying Text," **p. 69**.

- **From Right Margin**—Enables you to align numbers at the decimal point, and the decimal point aligns at the distance you specify from the right margin of the cell.
- **Digits After Decimal**—Enables you to align numbers at the decimal point, and the decimal point aligns with enough space to accommodate *n* number of digits. The actual distance varies depending on the font size.

TIP FROM



If you want to decimal-align a column of numbers, but want them to appear farther from the right edge of the table column, choose From Right Margin in the Column tab of the Table Format dialog box.

In addition to column width, explained earlier in this chapter in the section "Changing Column Widths," you can also specify the left and right text margins for your columns. The default is 0.083 inch (1/12 inch) .

FORMATTING CELLS

Within cells, you format text as you normally do in a document. Simply select the text and add whatever attributes you want. However, you can also format a cell so that any text you add to the cell automatically acquires the cell's attributes.

For example, if you want all the text in a cell to be bold, first select the cell (move the mouse pointer to the edge of the cell, and click when the pointer turns to an arrow), and then click the Bold button on the toolbar or press Ctrl+B.

After you format a column of cells, as described in the preceding section, you might find that you also need to change the justification or attributes of a single cell or group of cells within that column.

To change the format of a single cell, other than for text attributes, position the cursor in the cell you want to change, open the Table Format dialog box, and click the Cell tab. WordPerfect displays the controls for formatting cells (see Figure 10.29).

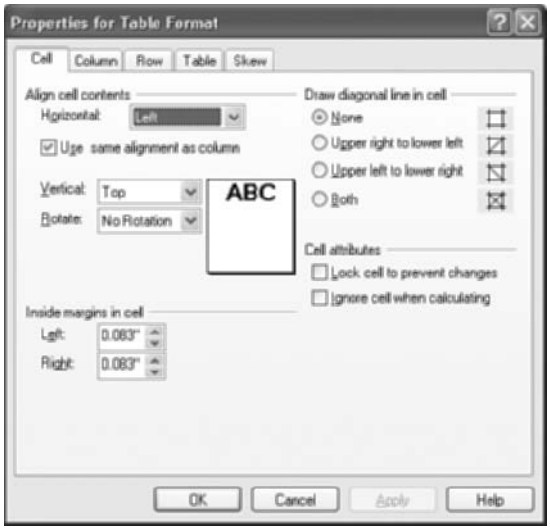


Figure 10.29
To format cells in a table, use the Cell tab in the Table Format dialog box.

To change the format of a group of cells, select the cells you want to change and open the Table Format dialog box. The changes you choose from the Cell tab then apply to each of the selected cells.

NOTE

> Although it might seem logical to click the Row tab to format all the cells in a row, you must select all the cells first and then click the Cell tab from the Table Format dialog box to format the row of cells.

Many of the options for formatting cells are identical to those used for formatting columns, such as the alignment or inside margins options. Other options used only for formatting cells include

- **Use Same Alignment As Column**—By default, each cell assumes the attributes that are in effect for the column in which it resides. Thus, when you first choose the Table Format dialog box Cell tab, the Use Same Alignment As Column check box is selected. If you select a justification that differs from the column type, WordPerfect deselects this box. To reassign the column defaults, click Use Column Justification. WordPerfect automatically turns off any cell attributes that conflict with the default column formats.

- **Vertical**—By default, WordPerfect vertically aligns all text in a cell at the top of the cell. Choose Bottom or Center to change the vertical alignment of the text in a cell. Or click the Vertical Alignment button on the property bar and choose Top, Center, or Bottom.

- **Rotate**—In addition, you can rotate the text within a cell by choosing 90 Degrees, 180 Degrees, or 270 Degrees from the Rotate drop-down list. You can also click the Rotate Cell button on the property bar to rotate the cell contents by 90 degrees.

NOTE

When WordPerfect rotates text, it actually takes text you type and places it in graphics text boxes. To edit the information in rotated cells, you must click the text in the cell, make your changes in the Text edit screen, and click Close.

➔ For more information on working with text graphics boxes, **see** "Adding Text Boxes As Graphic Objects," **p. Web:14**.

- **Lock Cell to Prevent Changes**—This option protects a cell from being altered. For example, if you want to prevent a user from entering data in certain cells in a form, you can lock them.

CAUTION

Do not lock all of the cells in a table or you won't be able to unlock them. You *must* be able to click in an unlocked cell to bring up the Properties for Table Format dialog box so you can disable the Lock Cell to Prevent Changes check box.

- **Ignore Cell When Calculating**—If the cell contains numbers that you don't want calculated during a math operation, you can specify that WordPerfect ignore the numbers.

➔ For information on using formulas and calculations in WordPerfect tables, **see** "Using Spreadsheet Formulas in Tables," **p. 366**.

- **Draw Diagonal Line in Cell**—You can add diagonal lines to cells by choosing one of these options: None, Upper Right to Lower Left, Upper Left to Lower Right, or Both.

FORMATTING AN ENTIRE TABLE

Most of the changes you make to tables are to columns and cells. Sometimes, however, you might want to use a certain format as a default for an entire table. When you click the Table tab in the Table Format dialog box, WordPerfect presents the same controls used for columns and cells (see Figure 10.30).

The options you select apply to the entire table, except to columns or cells you already modified.

Three options apply only to tables:

- **Table Position on Page**—By default, tables are full-justified in your document, which means the table stretches from left margin to right margin. This option lets you change the justification of the table itself, not the text in the cells of the table.
- **Insert New Rows Automatically**—Deselect this check box to prevent WordPerfect from adding a new row to the table when you press Tab in the last cell of the table.
- **Disable Locks in All Cells**—This option lets you quickly disable any cell locks you might have set. After you finish modifying the locked cells, uncheck this box again to reset the locks.

Figure 10.30
For changes that affect the entire table, use the Table tab in the Table Format dialog box.

CHANGING TABLE LINES, BORDERS, AND FILLS

One part of a table's effectiveness is lines, which help the reader better understand the information. For tables in which a user needs to fill in information, lines also help show where to enter appropriate data. By default, WordPerfect surrounds each cell with a single line, giving the appearance that the table also is surrounded by a single line. In fact, there is no border at all around a WordPerfect table. In addition to lines, you can fill the entire table or individual cells with varying patterns or colors of shading.

UNDERSTANDING DEFAULT LINE STYLES

The default style for table lines is a single line. Although it might seem that a single line appears on all four sides of a cell, only two sides typically make up a cell: the left and the top. If you were to "explode" a typical table of three rows and three columns, the cells would resemble the cells shown in Figure 10.31. (Notice that lines appear on the right and bottom sides of cells on the right and bottom of the table.)

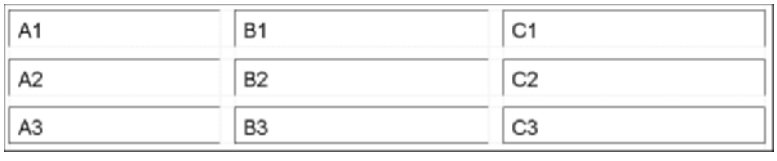


Figure 10.31
An exploded WordPerfect table illustrates default line segments.

When you specify a line style other than the default, you force WordPerfect to display that style at the location you specify. But you must be careful: If you specify a single line for the right side of a cell, even though its adjoining single cell line does not print, the line does not align with the other single lines in that column. In Figure 10.32, for example, notice that

the single line between cells A2 and B2 does not align with the other lines between columns A and B. To avoid this situation, make changes only to the top and left sides of cells whenever possible.

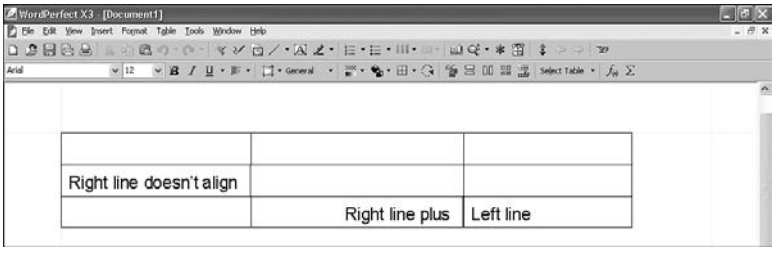


Figure 10.32
If you change lines other than the default left and top lines, your table lines might not align properly.

If you change both adjoining cell sides, you can create interesting effects because both lines print (refer to Figure 10.32, where two adjoining single lines appear to create a single thick line).

CHANGING CELL LINES

Changing the default single line between cells is simple. You can change to another line style or decide to use no line at all. To change a table cell line style, follow these steps:

1. Position your cursor in the cell.
2. Choose Table, Borders/Fill. Alternatively, you can press Shift+F12, or you can choose Borders/Fill from the QuickMenu. WordPerfect displays the Properties for Table Borders/Fill dialog box (see Figure 10.33).

   This dialog box defaults to controls for the outside of the current selection and lists the current style for each of the line segments included in the selected cells. Unless you change them, each line uses the default (single line).

Figure 10.33
The Table Borders/Fill dialog box is used to change line styles for cells, groups of cells, the entire table, or the table border.

3. Click the palette button of the cell's line segment you want to change (for example, Bottom). WordPerfect displays a palette of line style choices (see Figure 10.34).

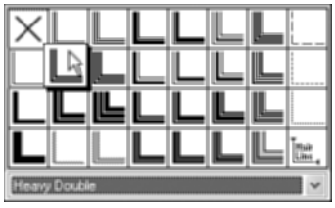


Figure 10.34
You can choose a table line style from a palette of choices.

4. Move the mouse pointer to the style you want to use. The name of the style appears in a drop-down list at the bottom of the palette. If you want to see more styles, click the drop-down list.
5. From the palette or the drop-down list, select the style you want. The preview box shows the result of the selection.
6. After choosing each line style you want, click OK or press Enter. WordPerfect makes the change to your table.

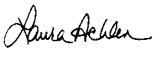
NOTE

Depending on the resolution of your computer's monitor or the scale of your document display, single lines might not appear at all, or double lines might appear as a thicker single line. To be sure you have the correct line, you can increase the zoom percentage of your document.

If you select more than one cell, the Borders/Fill dialog box changes, and the default choice considers the group of cells as one large cell, with additional inside lines. Options you can choose include

- **Left, Right, Top, or Bottom**—Changes in these line styles affect only one side of the group of cells. For example, if you choose Left, only the left line of the left column of cells changes.
- **Inside**—Only those lines that separate cells change with this option.
- **Outside**—All the lines on the outer edges of the groups of cells change. Changing this option automatically changes the styles of the left, right, top, and bottom styles. If you then change an individual side, the word Mixed appears beside this button.

TIP FROM



If you want to change most of the lines to a certain style, change the Outside line style first, and then make changes to individual sides.

TURNING OFF CELL LINES

To turn off the line between two cells, position the cursor in one of the cells, choose Borders/Fill from the QuickMenu, and change the appropriate line segment to `<None>` (click the large X on the palette).

To turn off all the lines in a table, select all the cells, select Borders/Fill from the QuickMenu, and change all the Inside and Outside lines to `<None>`.

Whenever you choose `<None>` as the line style, WordPerfect displays instead a light-gray gridline. The gridline does not print, but it does help you know where the cell lines are located. Figure 10.35 shows table gridlines for a table that contains no cell lines.

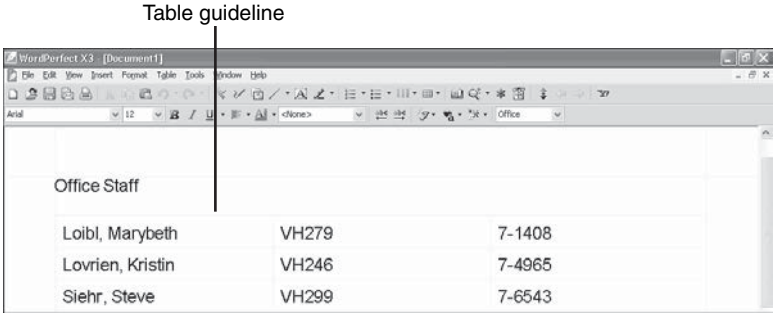


Figure 10.35
If you select `<None>` as your line style, WordPerfect still displays a grid to help you see where your cells are located.

You can also change the default line style to `<None>` by choosing Borders/Fill from the QuickMenu, and then clicking the Table tab. Then in the Default Cell Lines area, click the Line button and choose `<None>`. Note, however, that any changes you made to individual line segments still print.

TIP FROM

If you're a longtime WordPerfect user and are accustomed to using parallel columns to format your text, consider using tables without lines instead. The effect is the same, but working with tables is much easier than working with parallel columns.

CREATING CUSTOM LINES

In addition to using predefined line styles, you can create your own custom line styles and effects. Furthermore, you can save your custom lines in style templates or in SpeedFormat table styles and use them over and over.

To create a custom line (for example, a colored single and dashed line), follow these steps:

1. Choose Format, Graphics Styles. WordPerfect displays the Graphics Styles dialog box (see Figure 10.36). Note that in the Graphics Styles dialog box you can create or edit box, line, border, or fill styles. The procedures for each type are similar.

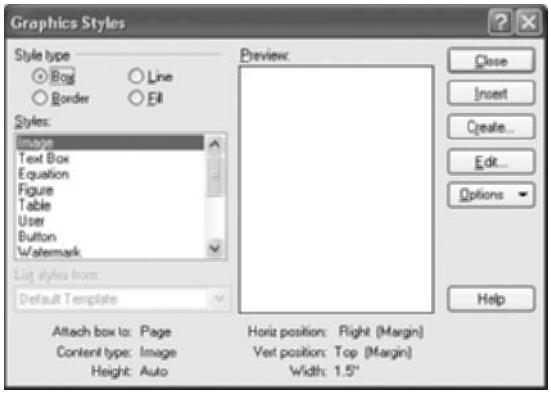


Figure 10.36
You can use the Graphics Styles dialog box to create a new graphics line style.

2. Choose Line to display existing line styles, and to prepare for creating a new line style.
3. Click Create. WordPerfect presents the Create Line Style dialog box (see Figure 10.37).

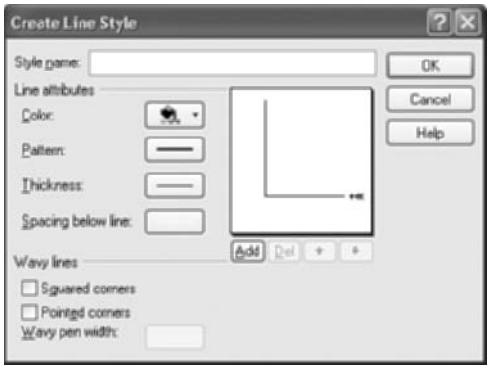


Figure 10.37
The Create Line Style dialog box is used to customize your line styles.

4. In the Style Name text box, type a unique name (for example, Special Line).
5. Change the color, pattern, and thickness of the first line by using the corresponding palette buttons.
6. Click Add to add another line to the style. Note that the arrow in the preview box points at the currently selected line. You can use the up and down arrows beneath the preview box to select lines in the style.
7. Change the Color, Pattern, and Thickness of the second, or any other line, using the corresponding palette buttons.
8. If you want spacing between the lines, select a spacing width from the Spacing Below Line palette.
9. Click OK to return to the Graphics Styles dialog box. The name of the newly created style appears on the list of available styles.
10. Click Close to return to your document. You can now use the new line style when you open the Borders/Fill dialog box.

NOTE

> The new line style will not show on the Properties for Table Borders/Fill dialog box palettes (click one of the Cell Lines palette buttons), but it will appear in the drop-down list at the bottom of the palette.

If you want to keep your new line style only in the current document, simply use the line style wherever you want and save the document. However, if you think you want to use this line style in other documents, you can save it in a template.

➔ For details on working with customized styles, **see** "Creating Custom Styles," **p. 233**.

CHANGING BORDERS

The border around a WordPerfect table is separate from the lines that surround each of the cells in the table. By default, a WordPerfect table border has no border style. To change a border style, follow these steps:

1. From the Table menu or from the QuickMenu, choose Borders/Fill.
2. From the resulting Table Borders/Fill dialog box, click the Table tab to display table-related lines and fill options (see Figure 10.38, shown with several options chosen).

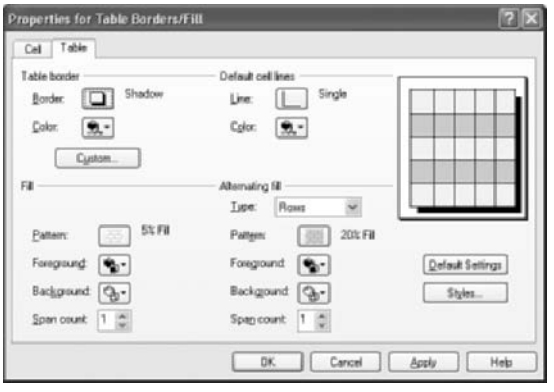


Figure 10.38
You can use the Table tab of the Table Borders/Fill dialog box to change your table border.

3. In the Table Border area, choose a border style from the Border palette. Note the resulting effect in the preview box.
4. Click Apply to apply the changes but to remain in the dialog box, or click OK to apply the changes and return to your table.

NOTE

> If you choose specific styles for both the border and the outside table cell lines, both styles print.

In addition to the standard list of border styles, you can customize your border to include special combinations of lines, shading, and even drop shadow border effects. As with line styles, you can also save custom border styles.

To customize a table border, follow these steps:

1. Open the Table Borders/Fill dialog box and click the Table tab (refer to Figure 10.38).
2. Select any border style that approximates what you want. (Unless a border style is selected, you can't customize the border!)
3. Click Custom to display the Customize Border dialog box (see Figure 10.39).

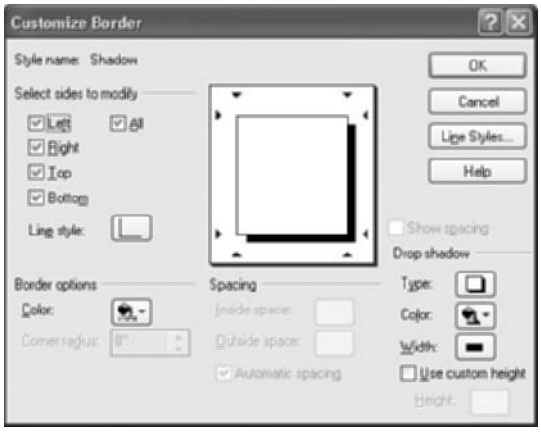


Figure 10.39
You can use the Customize Border dialog box to change the border style—for example, by adding a drop shadow to the table.

4. Change the Line Style for any of the sides selected. If All is checked, all sides are changed at the same time.
5. Click Color to choose a line style color (see Figure 10.40). If you click Use Line Style Color, the customize screen reverts to the color of the line style you originally selected.

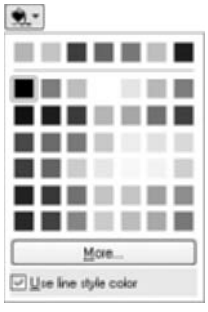


Figure 10.40
You can choose a new line color from the palette or choose Use Line Style Color to force your line to use the default color of the selected line style.

6. To add a drop shadow, choose the Type, Color, and the Width you want.
7. When you are satisfied with your changes as shown in the preview box, click OK.
8. Click OK again to apply the custom border to your table.

NOTE

> One of the many improvements in WordPerfect X3 is that table borders have been enhanced so that they are imported more accurately from Microsoft Word. In other words, when you open a Microsoft Word document in WordPerfect X3, the table borders are translated with more accuracy than ever before.

➔ For more information on how to save styles for future use, **see** "Creating Custom Styles," **p. 233**.

CHANGING FILLS

WordPerfect enables you to fill individual cells, groups of cells, or the entire table with black, colors, or shades of gray or color. Unless you have a color printer, however, the most practical use for this feature is to shade cells you want to set apart from the rest of the table. Suppose, for example, that you want to set off the column headings from the rest of a table. To shade a cell or group of cells, follow these steps:

1. Position your cursor in the cell (or select the group of cells) you want to change.

2. Click the Cell Fill button. WordPerfect displays a palette of fill patterns (see Figure 10.41).

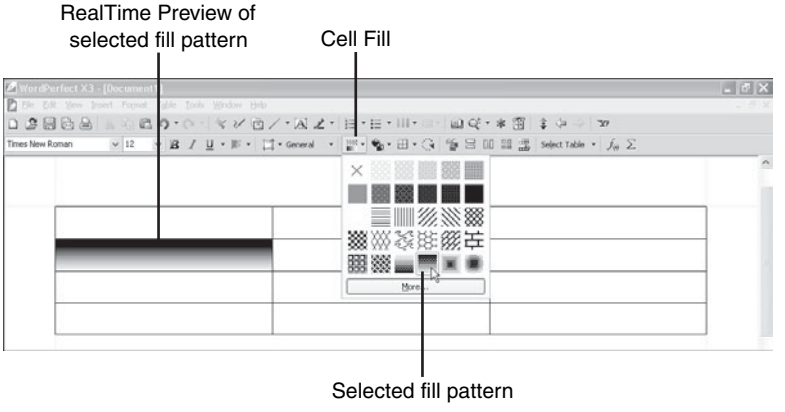


Figure 10.41
The fill cell palette offers an array of fill patterns, including gradient fills.

3. Click the fill pattern you want.

4. Click the Table Cell Foreground Fill Color button to change the foreground color. (Usually the foreground color is the pattern.)

You can select different shading or fill styles for any number of cells in your table. You can even create your own custom fills, including gradient shading and special patterns.

TIP FROM

If you plan to print text in a cell, even when using a non-color printer, use a light color such as yellow, or if you are filling with a dark color, choose 20% fill or less. Higher percentages of shading with darker colors usually make reading text contained in that cell difficult.

TIP FROM

You can create white text on black background cells by using the reverse.wcm macro that comes with WordPerfect. Simply select the cells you want to change, and then choose Tools, Macro, Play, and play the reverse.wcm macro. The macro lets you choose the background color, the text color, and whether the cells should be a table header.

➔ For more information on how to use WordPerfect macros, **see** Chapter 21, "Using Experts and Macros."

TROUBLESHOOTING

MOUSE PRACTICE MAKES PERFECT

I'm not too steady with the mouse. When I try to use the table grid to create a table, I sometimes get the wrong number of rows or columns.

As you practice, you'll get better at choosing just the right size. If you make a mistake, just click the Undo button on the toolbar (or press Ctrl+Z). The table goes away, and you can try again.

BUT I DIDN'T WANT THAT THERE!

Sometimes when I try to select cells in a table, the content of those cells ends up in some other part of the table.

You're probably inadvertently using WordPerfect's drag-and-drop feature. After selecting part of the cells you want, you're letting the mouse button go, and then clicking the already selected cells again and dragging to what should have been the last cell in your selection. When you release the mouse button, the first selection of cells is moved (dropped) into the new location. If this happens, just click the Undo button on the toolbar (or choose Edit, Undo) and try again.

TABLE COLUMN ALIGNMENT

I changed the format of my table column to decimal-aligned, but the text still appears left-aligned.

This is an easy mistake to make. When you used the Table Format dialog box, you probably forgot to click the Column tab, so all you formatted was a single cell.

To correct the problem, right-click in that column again, and then choose Format from the QuickMenu. This time, click the Column tab and make the desired changes.

EDITING ROTATED TEXT

I rotated text in some table cells, but I now need to change the text, and I can't figure out how to edit it.

When WordPerfect rotates text, it actually takes text you type and places it in graphics text boxes. To edit the information in the rotated cells, double-click the text in the cell, make your changes in the Text edit screen, and click Close.

➔ For more information on working with text graphics boxes, **see** "Adding Text Boxes As Graphic Objects," **p. Web:14**.

JUSTIFICATION CHANGES AREN'T ACCEPTED

After making a justification change to a column, one of the cells doesn't seem to accept the new change.

This is usually because you formatted a single cell at some point. To make the cell match the rest of the column, right-click in that cell, choose Format from the QuickMenu, and with the Cell tab selected, make sure the Use Same Alignment As Column check box is enabled.

PLACING GRAPHIC IMAGES

I can't seem to position my graphic image properly in a table cell.

Graphics images require enough room to display properly. You might have to reduce the size of the graphic image or increase the width or height of the table cell. There is no exact rule for accomplishing this task, so keep trying (and using Undo) until you get it the way you want it.

CHAPTER 11

Organizing Information with Lists and Outlines

In this chapter

by Read Gilgen

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Working with Outlines 290

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UNDERSTANDING OUTLINES

Not all text is narrative prose. Sometimes you use WordPerfect to create structured lists, such as the following, that summarize and organize information:

- Agendas
- Notes for a speech
- A summary of points covered in a class or workshop
- Overhead transparency lists
- To-do lists
- Structured reports with executive summaries
- Legal documents that require structured headings

Any time you need to organize information in lists, WordPerfect can help with numbered, bulleted, and text lists and outlines. Figure 11.1 shows examples of four types of WordPerfect lists.

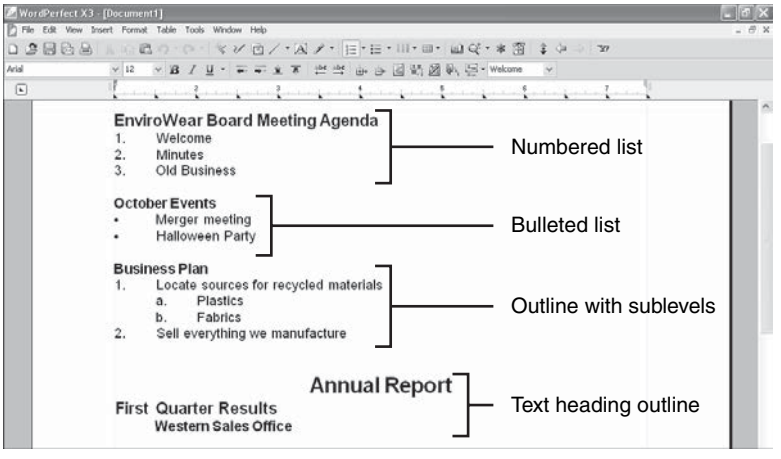

Figure 11.1
WordPerfect enables you to create numbered and bulleted lists, as well as outlines to help you organize information.

WORKING WITH BULLETED AND NUMBERED LISTS

Bulleted and numbered lists help draw attention to important bits of information. For example, you might use bullets to list product features or highlights of an upcoming event. You might prefer to use numbers for a "to do" list, or an agenda, where sequence of the various items is important.

Lists with bullets or numbers are nothing more than paragraphs with special styles added. Typically, the style includes a bullet or number character followed by an indent code to set off the text of the paragraph (refer to Figure 11.1).

CREATING BULLETED LISTS

The old "brute force" way to add bullets was to type an asterisk (*) followed by the bulleted information. WordPerfect now makes it simple to create bulleted lists.

The easiest way to start is to click the Bullet button on the Toolbar. WordPerfect inserts a bullet and an indent, after which you type the bulleted item. When you press Enter, WordPerfect inserts a new bullet for the second bulleted line (see Figure 11.2, which also shows the bullet styles in Reveal Codes).

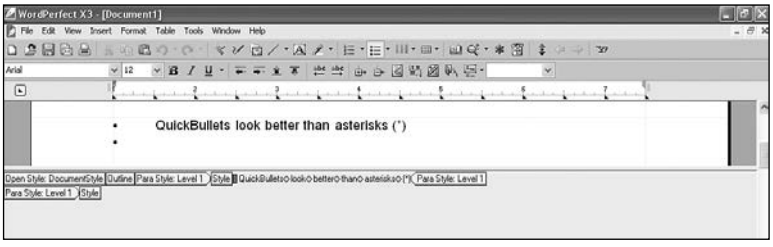

Figure 11.2
Bulleted or numbered paragraphs are controlled by paragraph styles.

WordPerfect actually offers several predefined bullet styles. To create a bulleted list, changing the default style, follow these easy steps:

1. Choose Insert, Outline/Bullets & Numbering (a daunting menu entry). WordPerfect displays the Bullets & Numbering dialog box.
2. Click the Bullets tab to display a list of predefined bullet list styles (see Figure 11.3).

Figure 11.3
You can use the Bullets tab of the Bullets & Numbering dialog box to choose a bullet style for your list.

3. Click the style you want to use and click OK. WordPerfect inserts the chosen bullet style, which includes the bullet character and an indented paragraph.
4. Type the text of the first bullet.
5. Press Enter, and WordPerfect inserts the next bullet.
6. Repeat steps 4 and 5 until you finish the list, and then press Enter one last time.
7. Press Backspace or click the Bullet button to erase the last bullet and turn off the bullet paragraph style.

NOTE

Clicking the Bullet button on the toolbar automatically turns off or turns on the currently selected bullet style.

TIP FROM

Read Gilgen

With the cursor positioned at the top of the outline, click the drop-down arrow on the Bullet button on the Toolbar to see a palette of available bullet styles. Then hover over a bullet style with the mouse pointer to see the effect in WordPerfect's real-time preview, or click More to go to the Bullets & Numbering dialog box.

CREATING NUMBERED LISTS

Most people forget that computers are very good at keeping track of and calculating numbers. This includes numbered lists, and WordPerfect is excellent at making sure your numbered list is always correct.

You create numbered lists very much the same way you create bulleted lists. Simply click the Numbering button on the Toolbar. WordPerfect inserts a number, period, and an indent, after which you type the numbered item. When you press Enter, WordPerfect automatically inserts an incremented number (see Figure 11.4).

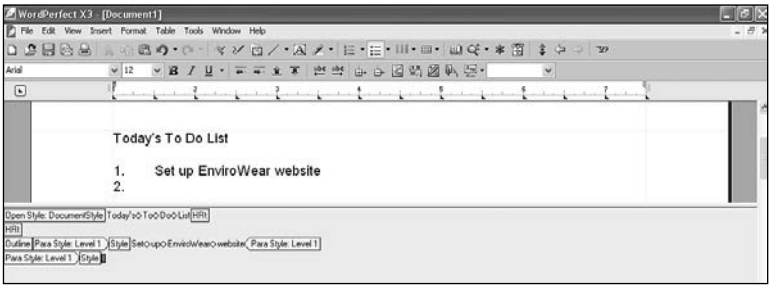

Figure 11.4 WordPerfect automatically increments numbers in a numbered list so you don't have to worry about correct numerical sequences.

Once again, you can choose different numbering styles by clicking the drop-down arrow on the Numbering button on the toolbar.

You can also choose specific numbering styles, some of which really are outline styles, following these steps:

1. Choose Insert, Outline/Bullets & Numbering.
2. Click the Numbers tab and choose a number style (see Figure 11.5). Use the scrollbar to see all the styles.

Figure 11.5
WordPerfect provides several predefined numbered list styles.

3. Click OK, and WordPerfect places a number style in your document that includes a number, typically followed by a period and an indent code.
4. Type some text, and when you press Enter, WordPerfect automatically increments the number for you.
5. Press Backspace or click the Numbering button on the toolbar to turn off the numbered list.

EDITING LISTS

Before long you'll want to know how to vary or edit a bulleted or numbered list. For example, you might want an extra blank line between each list item, or you might need to insert a new numbered line. The following are some of the ways to modify a bulleted or numbered list:

- **Add an extra blank line while creating the list**—If you are creating a list for the first time, after you press Enter, simply press Enter again to move the bullet or number down one line.

- **Add an extra blank line after creating the list**—Position the cursor on the line you want to move. Press Home to move the insertion point to the left end of the text, and press Enter to move the line down.
- **Insert a new line**—Position the cursor at the end of the line preceding the location where you want to insert a new line and press Enter. WordPerfect inserts a new number or bullet. Type the text of the new bulleted paragraph.

NOTE

Note that when you add or remove a numbered line, WordPerfect automatically assigns the correct number in sequence, and also increases or decreases the numbers of each line following the change. This powerful feature can save you lots of time because you don't have to retype the numbers each time you make a change.

TIP FROM

Read Gilgen

Because numbered lists are so easy to create and edit, you should get in the habit of using them even for short lists. Simply click the Numbering button on the toolbar, or press Ctrl+H to begin a numbered list.

If clicking the Number button or pressing Ctrl+H turned off outline numbering in your paragraph, see "How Did I Turn Off Outline Numbering?" in the Troubleshooting section at the end of this chapter.

- **Remove a line**—Delete the text and bullet or number, as you do any text you want to remove. If you're using numbers, WordPerfect automatically renumbers your list.

- **Change a normal text paragraph to a bullet or number**—If you have already typed the text of the bullet (for example, a paragraph you want to highlight with a bullet), click the Bullet button or the Numbering button on the toolbar. WordPerfect adds the bullet or number style to the paragraph.
- **Change a bulleted or numbered paragraph to normal text**—If you decide you don't want a bullet paragraph, position the cursor anywhere on the paragraph and click the Bullet button on the toolbar. To convert a numbered paragraph to normal text, click the Numbering button on the toolbar.

TIP FROM

Read Gilgen

To toggle between bulleted or numbered paragraphs and normal text, you can click the Bullet button on the toolbar, or you can simply press Ctrl+H.

CHANGING THE BULLET OR NUMBERING STYLE

Changing the numbering or bullet style can be as easy as selecting a different predefined style or as complex as creating an entirely new bullet or numbering style.

Suppose, for example, you want to change a numbered list to one that uses capital letters. Follow these steps:

1. Access the Bullets & Numbering dialog box by choosing Insert, Outline/Bullets & Numbering.

TIP FROM

Read Gilgen

> You can bypass the menus to access the Bullets & Numbering box by clicking the drop-down menu on the Numbering button or the Bullet button on the toolbar, and then choosing More from the palette of choices.

2. Click the Numbers or Bullets tab, depending on the style you want to change to.

NOTE

> You can change any list from one style type to another. For example, you can change a numbered list to a bulleted list, and vice versa.

3. Click the style you want, for example, the Letters style (refer to Figure 11.5).
4. Choose one of the listed options:
   - **Apply Selected Layout to Current Outline/List**—This option appears when the insertion point is located within a WordPerfect list of any kind. Selecting the option applies the selected style to the entire list (see Figure 11.6) .

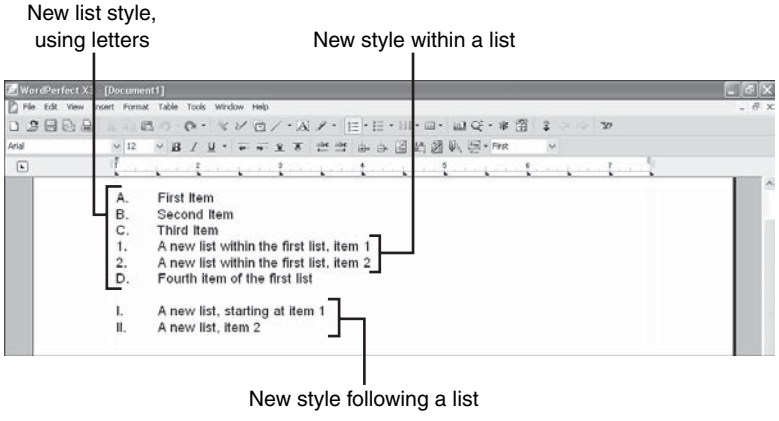

Figure 11.6
You can use numbering/outline options to create new lists or to modify the sequence in an existing list.

   - **Start New Outline/List**—This option starts a new style at the insertion point. If you are in the middle of a list, the new style does not affect items before the insertion point—only those after it. If you are at the end of a list, it simply starts a new list, beginning at number 1 if you are using numbers. This option is the default when you click the Numbering button on the toolbar.

- **Insert New Outline/List Within Current Outline/List**—If the insertion point is resting on a list paragraph, that paragraph becomes the first item in a new list. Items added after it are also part of the same list style. Items in the original list, however, are not changed (refer to Figure 11.6).

TIP FROM

Read Gilgen

Numbers or letters nested within another outline that uses numbers or letters can be quite confusing. Instead, consider using numbers for main topics and bullets for the subtopics.

- **Resume Numbering from Previous Outline/List**—If you turned off the list style, and inserted other normal text (including hard returns), you have the option of picking up where you left off, both in style and numbering sequence. If you choose another style, this option is not available (it is grayed out) and you must start a new list.

5. You also can choose a different tab setting for your numbered lists. By default, WordPerfect resets the tabs at .25". If you want to keep the normal 1/2-inch tabs, deselect this option, or change the tab setting to your preference.

TIP FROM

Read Gilgen

Reducing the amount of tab space between the bullet or number and the text can give your list a tighter, cleaner look. However, don't make the amount too small because wider, two- or three-digit numbers in numbered lists can cause the text to look uneven. 1/3" often works better than WordPerfect's predefined 1/4".

6. Click OK to apply the new style and options to your list.

WORKING WITH OUTLINES

WordPerfect was one of the first programs to offer fully functional outlining capabilities. Unfortunately, the feature was somewhat difficult to master, and as a result it is still one of WordPerfect's best-kept secrets. WordPerfect 12 changes all that with its easy-to-use, yet powerful, outlining feature.

Outlines work very much like lists, but add another dimension (see Figure 11.7).

For example, in Figure 11.7, the list presents only one level of relatively equal information, numbered 1, 2, 3, and so on. The outline, however, presents multiple levels. Each level is identified by its indentation and by its numbering style.

The advantages of working with outlines become evident after you begin working with them. They are easy to create, they are even easier to edit, and they make the task of organizing information a snap. You'll soon wonder how you ever got along without this feature.

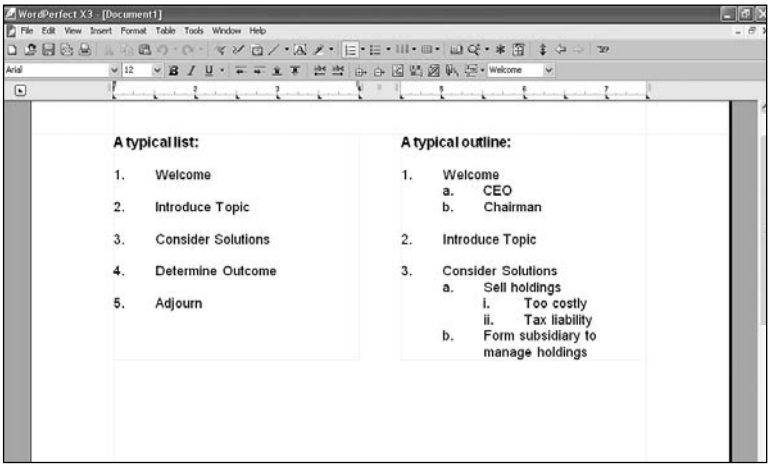

Figure 11.7
Outlines are like lists, but add sublevels for greater depth in organizing information.

CREATING AN OUTLINE

Although WordPerfect offers several outline styles, the numbered paragraphs style is the default. To create a simple numbered paragraph outline, position the insertion point at the left margin, and then follow these steps:

NOTE

> Although WordPerfect offers myriad options, you'll first step through the basics to see just how easy it is to create a multilevel outline. You'll return to the details after that.

1. Choose Insert, Outlines/Bullets & Numbering. WordPerfect displays the Bullets & Numbering dialog box, with the Numbers tab and Paragraph style selected (refer to Figure 11.5).

NOTE

> If you've recently used another number or bullet outline style, you might have to click the Numbers tab and select the Paragraph outline style.

2. Click OK, and WordPerfect places a number, followed by a period and an indent in your document (for example, 1.).

TIP FROM

Read Gilgen

> You can also begin a numbered paragraph outline by clicking the Numbering button on the toolbar, or by pressing Ctrl+H.

CAUTION

> Make sure the insertion point is positioned on a blank line. If the insertion point is located inside an existing paragraph, WordPerfect converts the paragraph to a numbered outline paragraph when you turn on outlining. If you accidentally number a text paragraph, simply use Undo or press Ctrl+H.

3. Type the content of the first paragraph—for example, Welcome (refer to the outline in Figure 11.7 for sample text you can type).
4. To insert the next number, press Enter. If you want to move the number down another line before you type, press Enter again.
5. To change a line to the second level, press Tab. WordPerfect moves to the next tab stop and changes the number to a letter (for example, a).
6. Type the content of the first subtopic.
7. Press Enter, and WordPerfect inserts the next number at the same level as the preceding paragraph (for example, b).
8. Type the second subtopic, and press Enter.
9. To change a line back to the first level, before typing, press Shift+Tab. WordPerfect moves to the previous tab stop and changes the letter to a number (for example, 2).
10. Continue typing and inserting numbers until you finish the outline. Remember to use the following keys:
    - Press Enter to add a new numbered line.
    - Press Tab to move to the next level to the right.
    - Press Shift+Tab to return to a previous level to the left.
11. Press Enter one last time and then press Backspace to delete the unneeded outline number and to turn off outlining.

NOTE

> You can only use up to nine outline levels. WordPerfect does not allow you to tab past the ninth level.

UNDERSTANDING OUTLINES

Now that you understand how easy it is to create an outline, you can explore other options and features.

OUTLINE TERMINOLOGY

If you understand outline terminology, it's easier to understand WordPerfect's outline features:

- **Outline item**—A paragraph of an outline, identified by a single number or bullet.
- **Body text**—Any non-outline text. Such paragraphs might appear between outline items in an outline, and also include blank lines (for example, a hard return).
- **Level**—Outline level refers to the horizontal position of the outline item, relative to other outline items. For example, items at the left margin are at the first level. Outline items that appear at the first tab stop are at the second level, and so on.
- **Family**—A group of outline items that belong together. For example, in Figure 11.7, items 1.a and 1.b are all part of the item 1 family of outline items, and items 3.a.i and 3.a.ii are part of the 3.a family.
- **Promote**—To give an outline item more importance, by moving the paragraph to the left. The item is also said to have been moved up a level.
- **Demote**—To give an outline item less importance, by moving it to the right. The item is also said to have been moved down a level.

USING THE OUTLINE PROPERTY BAR

When the insertion point is located within an outline, WordPerfect displays several Outline tools on the property bar (see Figure 11.8).

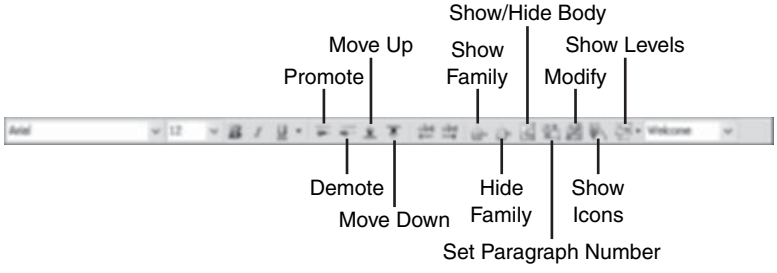

Figure 11.8
You can use Outline buttons on the property bar to work with your outlines.

The options represented by these buttons include the following:

- **Promote**—Changes the current outline level to the previous, higher level. The cursor can appear anywhere in the text of the current outline level for this button to work. This action has the same effect as pressing Shift+Tab when the insertion tab immediately follows the outline number.
- **Demote**—Changes the current outline level to the next, lower level. This is the same as pressing Tab when the insertion point immediately follows the outline number.

TIP FROM

Read Gilgen

Although you can demote and promote outline items using the property bar, you'll find it much faster and more natural to stick to the keyboard when creating outlines, using Tab and Shift+Tab respectively.

- **Move Up**—Moves an outline item, or selected family, up one line, while preserving the outline level. You can click several times to keep moving the item up in the outline.
- **Move Down**—Moves an outline item, or selected family, down one line, while preserving the outline level.
- **Show Family**—If you have hidden the sublevels of the current outline item, this option enables you to show all the sublevels again.
- **Hide Family**—Hides all the sublevels of the currently selected outline item. If the item has no sublevels, this option has no effect.
- **Show/Hide Body**—This option hides all non-outline text, such as titles, narrative paragraphs, and even blank lines (hard returns). Click the button again to show the body text along with the outline. This is particularly useful when you're using text outline headings, and you want to collapse the narrative into an outline format (see the section "Creating Text Outline Headings," later in this chapter).
- **Set Paragraph Number**—Click this button to display the Set Paragraph Number dialog box. Although you can select only numbers, the value of the current outline item changes accordingly; for example, a. changes to c. if you change the value from 1 to 3. This is particularly useful if you want to begin a new outline or numbering sequence later within the same document.
- **Modify**—Use this option to modify the current paragraph style (see the section "Creating and Editing Outline Styles," later in this chapter).
- **Show Icons**—This option displays outline icons to the left of the outline itself. T represents body text, and 1, 2, and so on indicate the levels of the outline items. You can click a number to select the item and its family.
- **Show Levels**—Use this option to collapse or expand an outline. For example, if you want to display only first-level outline items, click this option and select One. All other levels remain hidden until you select Nine to show all levels again.

Editing Outline Text

Editing the text in an outline is as easy as editing any other text. However, you might also find that you accidentally add or remove outline numbers as you edit your text.

If you accidentally add a paragraph number (for example, you press Enter and add the number), simply press Backspace to remove the number, and press Backspace again to remove the blank line.

If you accidentally remove a paragraph number (for example, you press Backspace when you didn't intend to), just click the Numbering button on the toolbar, or press Ctrl+H. Alternatively, you can press Backspace again to position the cursor at the end of the previous line, and press Enter to re-add the paragraph number.

HIDING AND SHOWING OUTLINE FAMILIES

If your outline is fairly extensive, with lots of text and sublevels, you can hide some of the text by hiding families or showing only certain levels. Hidden text does not print.

To hide all the sublevels of a specific outline family, follow these steps:

1. Position the cursor anywhere on the first line of the top level of the family you want to hide.

2. Click the Hide Family button on the property bar. WordPerfect collapses the outline for that family, showing only the top outline level and hiding all the others (see Figure 11.9). If you have displayed outline icons, the corresponding icon will show a + after it, indicating there is more to be displayed.

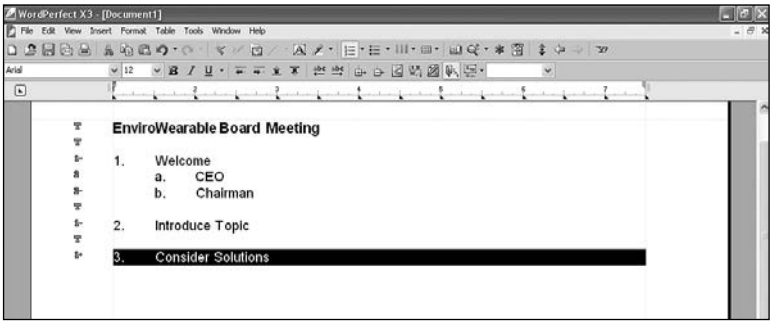

Figure 11.9
You can collapse the sublevels in an outline family by using the Hide Family button.

TIP FROM

Read Gilgen

If you select Show Icons, and the outline level numbers appear in the left margin, you can double-click an outline level number to hide (or show) its family.

To show all outline levels in a family, click the Show Family button on the property bar.

You can also display only the top levels of an outline, hiding all the rest. This is sometimes referred to as collapsing an outline. For example, you could have an agenda that displays two levels for all the participants, but hides the third level, where you list details that you don't want them to see.

To collapse an outline, showing only the top levels, click the Show Levels button on the property bar, and choose the number of levels you want to display (for example, Two). To expand an outline to show all levels, click the Show Levels button, and choose Nine.

CAUTION

If you choose <None> from the Show Levels menu, you hide the entire outline, and the Show Levels button disappears from the property bar. The only way you can redisplay your outline is to choose View, Toolbars, and select the Outline Tools toolbar. You can then click the Show Levels button on the toolbar and select the number of levels you want to display.

NOTE

When you collapse an outline or hide a family of outline text, a bug in WordPerfect also hides body text, including blank lines, that follows hidden sublevels. If you intend to print your collapsed outline, you might need to insert blank lines (hard returns) to restore the spacing you want. If you then expand the outline, you will have to remove the extra blank lines.

MOVING AND COPYING IN AN OUTLINE

Selecting outline items or families and moving or copying them is a bit trickier than simply cutting and pasting, as you are used to doing.

To select an outline family—for example, just a single outline item—you must select from the *left* of the outline number, to the *left* of the next outline number.

You can use any of the following methods:

- Using the mouse, position the pointer in the left margin, opposite the outline item you want to select. When the pointer turns to an arrow, double-click to select the outline item. This selects the outline number, the text of the outline item, and also the hard return at the end of the line.

TIP FROM

Read Gilgen

Although the Windows graphical interface begs you to use the mouse, when working with outlines, the keyboard can be much quicker and more precise. You can press the Home key twice to move to the left of an outline number, and use the Shift key along with cursor movement to select text.

- Using the keyboard, position the cursor on the first line of the outline item, and press Home twice. Then press and hold down Shift while moving the cursor to the next line of the outline. Continue holding the Shift key, and press Home twice to move to the left of the next item's outline number.

These methods also work when selecting an outline item along with its sublevels (the entire family). In addition, you can select an entire family by clicking the Show Icons button on the property bar to display outline level numbers in the left margin. Then click the level number that corresponds to the family you want to select.

After you select the portion of the outline you want to cut, copy, or delete, choose the appropriate action from the Edit menu, from the toolbar, or by using the keyboard, or use the mouse to drag and drop the selected outline text.

To paste an outline item or family, position the cursor at the left margin (to the left of the outline number) and choose Paste from the Edit menu, from the toolbar, or by using the keyboard.

TIP FROM

Read Gilgen

Instead of cutting and pasting an outline family, you can select a family by clicking the corresponding outline icon and then use the Move Up or Move Down buttons to move the parent along with the family to a new location.

ADJUSTING OUTLINE LEVELS

The real power of a WordPerfect outline is the capability to add or remove outline entries and to adjust the levels of those entries. As you do, WordPerfect automatically renumbers your entries.

To add an outline item, position the cursor following the preceding item and press Enter. WordPerfect inserts a new outline number at the same level as the preceding outline item. Before typing, press Tab to demote the item, or press Shift+Tab to promote the item.

Adjusting outline levels after you type the entries is just as easy. Position the cursor on the first line of the outline item you want to adjust, press Home to move the cursor to the beginning of the line (but following the outline number), and press Tab to demote the item, or press Shift+Tab to promote the item.

RENUMBERING AN OUTLINE

Normally, you do not have to worry about outline numbering because WordPerfect takes care of it automatically for you. When you add or remove lines, or adjust the level of an outline item, WordPerfect also adjusts the numbering so you don't have to.

However, if you want to set the numbering differently from what WordPerfect displays, you can do that, too. For example, if you begin a second outline in your document, WordPerfect tries to continue with the numbering sequence from the first outline. Instead, to have the numbering start over for the second outline, follow these steps:

1. Position the cursor where you want to change the outline number. Normally, you do this before beginning the new outline, but you can also place the cursor on an existing outline item.
2. Click the Set Paragraph Number button on the property bar. WordPerfect displays the Set Paragraph Number dialog box (see Figure 11.10).

Figure 11.10
You can set a new outline number value with the Set Paragraph Number dialog box.

3. Set the number you want to use and click OK.

NOTE

> Although you can select only numbers, the value of the current outline item changes accordingly. For example, a. changes to c. if you change the value from 1 to 3.

WordPerfect changes the outline number to the one you selected (see Figure 11.11).

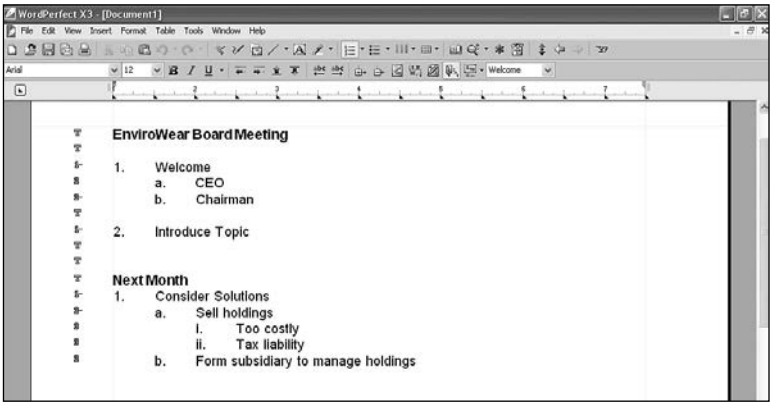

Figure 11.11
Changing the value of an outline number causes WordPerfect to renumber the numbers that follow it.

CREATING AND EDITING OUTLINE STYLES

WordPerfect offers a good selection of number and bullet styles. However, if the style you really need isn't available, you can create your own, changing numbers, letters and even punctuation. Sometimes creating a new outline style is as easy as editing an existing style to make it more like what you want.

To create a new outline style, follow these steps:

1. Choose Insert, Outline/Bullets & Numbering to access the Bullets & Numbering dialog box.
2. If you can, find a style that's already close to what you want, and select it.

TIP FROM

Read Gilgen

> You can save time and effort by creating an outline style based on an existing outline style.

3. Click Create. WordPerfect displays the Create Format dialog box (see Figure 11.12).
4. Type a name for your new style in the List Name box, and add an optional Description.
5. Choose the type of outline you want: Single Level List, or Multi Level List.
6. You can choose a predefined number set from the Based On drop-down list, although this isn't entirely necessary.

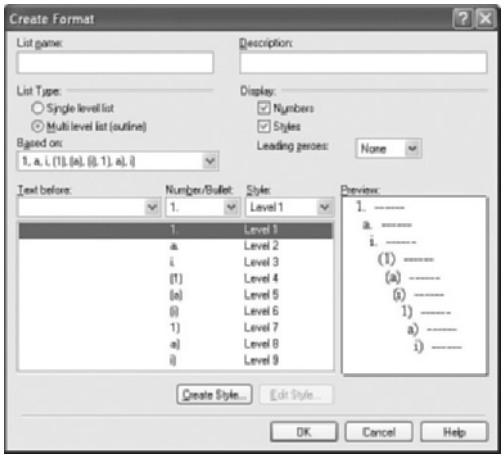

Figure 11.12
You can use the Create Format dialog box to create or edit an outline style.

7. The dialog box displays all the levels used in this outline style, and at the top of the list are the following controls:
   - **Text Before**—If you want text to appear before each outline number (for example, the word "Section"), select an option from the drop-down list or type your own text in this box.
   - **Number/Bullet**—You can click the drop-down list and choose a number or bullet, or scroll down this drop-down list and click More, which takes you to the Symbols dialog box (see Figure 11.13). Here you can choose from dozens of bullet icons. After you choose the number or bullet you want, you can also add punctuation in the Number/Bullet text box, such as a period, a colon, or parentheses.

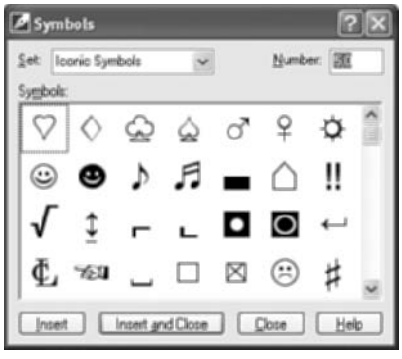

Figure 11.13
The Symbols dialog box offers dozens of possible bullet icons that you can use in a custom outline style.

   - **Style**—This applies predefined styles to the text and number or bullet you select. For example, the Level 1 style adds an indent code. You can further create and use formatting styles by choosing Create Style, creating the style, and then selecting it from the Style drop-down list. See Chapter 9, "Formatting with Styles," for more information on creating and editing styles.

8. Preview the results of your choices in the Preview area.
9. After you create or edit the style to your satisfaction, click OK to return to the Bullets & Numbering dialog box. Your new style now appears among the other styles (refer to Figure 11.5) .
10. To use the style, click OK.

TIP FROM

Read Gilgen

One of the options in the Create Format dialog box is to use leading zeroes. This, along with text prefixes, can be handy for creating sequential parts lists, tickets, invoices, work orders, and the like, where you want to maintain a fixed number of digits. For example, you could have PN-001, PN-002, PN-003, and so on, up to PN-999, simply by creating the style, and using a numbered list with that style.

If you save your document, you also save the outline style with the document. However, if you want to save your style for use with other documents, you must access the Bullets & Numbering dialog box, and choose Options. Then save the style as described in Chapter 9.

➔ For more information on saving styles that can be used in other documents, **see** "Saving Styles," **p. 238**.

CREATING TEXT OUTLINE HEADINGS

WordPerfect also helps you create structured documents by using outline headings. Consider the document shown in Figure 11.14. Each section heading is a text outline style, and if you were to display outline icons, the corresponding level number would appear in the left margin. In fact, you work with text-heading outlines much more like you work with styles than you do with outlines.

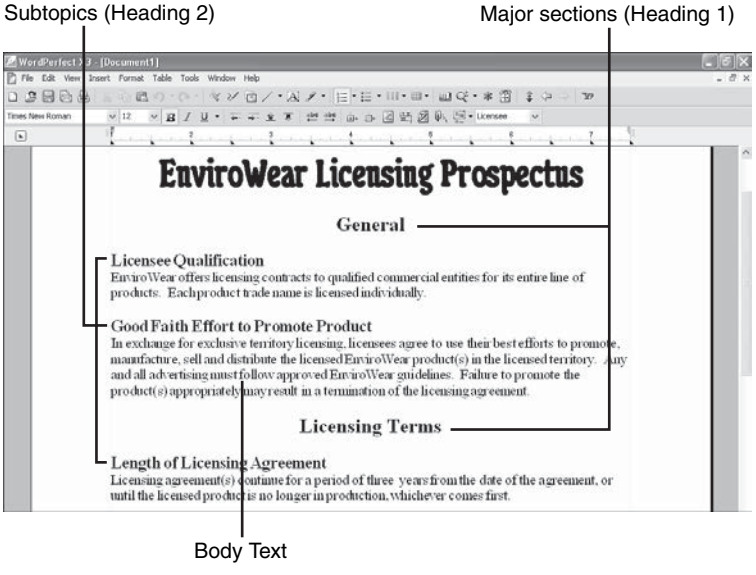

Figure 11.14
You can create structured text documents using the text-headings outline format.

CREATING OUTLINE HEADINGS FROM A NUMBERED OUTLINE

One method for creating text outline headings is to create a regular numbered outline first. Make all major section headings outline level one, secondary section headings outline level two, and so on. However, do not apply outline headings to the narrative paragraphs included in the sections. These should be body text. When you complete the outline (see Figure 11.15), follow these steps:

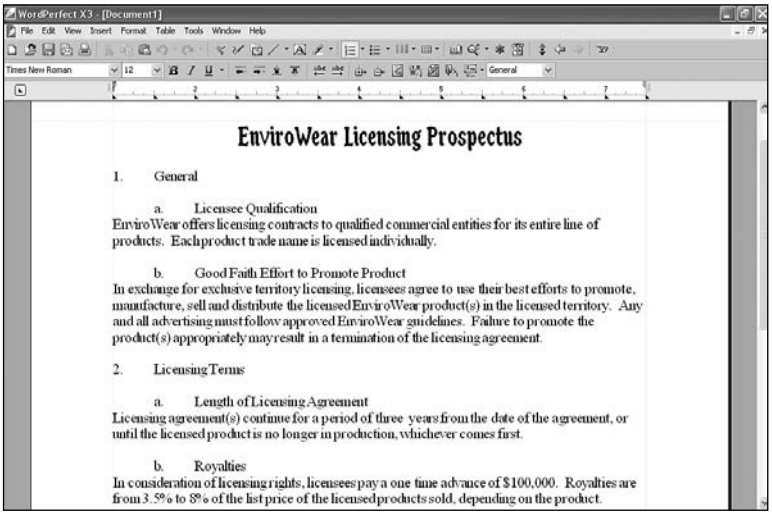

Figure 11.15
One method for creating text outline headings is to create a regular numbered outline first.

1. Choose Insert, Outline/Bullets & Numbering. When WordPerfect displays the Bullets & Numbering dialog box, click the Text tab (see Figure 11.16).

Figure 11.16
You can choose a text-heading outline style from the Text tab of the Bullets & Numbering dialog box.

2. Click the text style you want to use, typically the Headings style, and click OK.

WordPerfect now changes the numbered outline to a heading outline (refer to Figure 11.14).

CAUTION

> After you convert a numbered outline to a text-heading outline, you cannot change it back to a numbered outline without a great deal of effort. If you think you might want to use the numbered outline again, you should save the numbered outline before converting it to a text-heading outline.

ADDING OUTLINE HEADINGS TO NEW OR EXISTING TEXT

A second method for creating a text-heading outline is to add heading styles to section and topic headings. You can also use this method to convert regular text to a structured text-heading outline.

To add heading styles to new or existing text, follow these steps:

1. Position the cursor on the line you want to make a heading (either a new line or existing text).
2. Choose Format, Styles. WordPerfect displays the Styles dialog box (see Figure 11.17).

Figure 11.17
The Styles dialog box includes default text-heading outline styles.

3. Select the heading style you want. The heading number (for example, Heading 1) should correspond to the outline level you want. WordPerfect also displays the effect of that style in the preview box.
4. Click Insert to apply the heading style to the current paragraph.
5. Repeat steps 1–4 for all other headings in the document.

➔ To learn how using headings can make it easier to define and generate a table of contents, **see** "Using Heading Styles to Mark Text," **p. 424**.

NOTE

After you create the text-heading outline, you can use most of the tools on the property bar to work with the document (refer to Figure 11.8). For example, you can use Show Icons, Show Levels, Promote/Demote, Move Up/Down, and Hide Body. Set Number does not work in text-heading outlines.

TROUBLESHOOTING

HOW DID I TURN OFF OUTLINE NUMBERING?

I clicked the Number button (or pressed Ctrl+H) as you suggested, but it turned off the outline number of my paragraph.

Indeed, Ctrl+H (or clicking the Numbering button on the toolbar) turns off outline numbering for the current paragraph. You must first press Enter and then turn off outline numbering for the blank numbered line you just created. If you accidentally turn off numbering for a paragraph, simply position the cursor anywhere in the paragraph and click the Numbering button on the toolbar, or press Ctrl+H.

SKIPPING CURSOR

I can't seem to move the cursor to the left of my paragraph number. Instead, when I press the left-arrow key, it skips up a line.

Press Home once to move to the left of text of the numbered line. Then press Home again to move to the left of the paragraph number.

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Working with Graphics

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CHAPTER 12

Adding Graphics to Your Document

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by Read Gilgen

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INSERTING GRAPHIC IMAGES

Although WordPerfect can do wonders with your text alone, it also provides a dazzling array of graphic elements that can jazz up nearly any document. Graphic images are only one of the available elements; you can also use horizontal and vertical lines, text borders, graphic shapes such as arrows, and background graphics called watermarks.

CAUTION

> Working with graphics is fun! You can spend lots of time fiddling with graphic elements and have a great time following your creative instincts. However, remember that the basic content of the document should be your first concern. Then you can apply a judicious amount of graphics to enhance or illustrate what you say in the document.

INSERTING CLIP ART

When you think graphics, you think pictures. Perhaps the easiest of all graphic images to use is clip art, which is predesigned artwork that comes with WordPerfect. Although you might be more interested in using that photograph of your new Gizmo 2005 product, what you learn about working with clip art images will apply to photos as well.

To insert a clip art image in your document, follow these easy steps:

1. Position the cursor at the location where you want to insert the graphic image.
2. Choose Insert, Graphics, Clipart, or click the Clipart button on the toolbar. WordPerfect displays the Scrapbook dialog box (see Figure 12.1), which includes clip art, along with photos, video, and audio clips.

Figure 12.1
The WordPerfect Scrapbook provides more than 10,000 clip art images (on CD-ROM), as well as photos and audio and video clips.

NOTE

> All the examples of graphics used in this chapter can be found in the WordPerfect Scrapbook or on the WordPerfect CD-ROM (Disc 2), except as noted.

3. Scroll through the list of images and click the one you want.
4. Click Insert to place the image in your document, or just drag the image from the Scrapbook to your document.

Note that the image pushes aside the text that surrounds it, in the shape of a rectangle (see Figure 12.2). Note also in the figure that a special Graphics property bar appears to help you manipulate and modify the image.

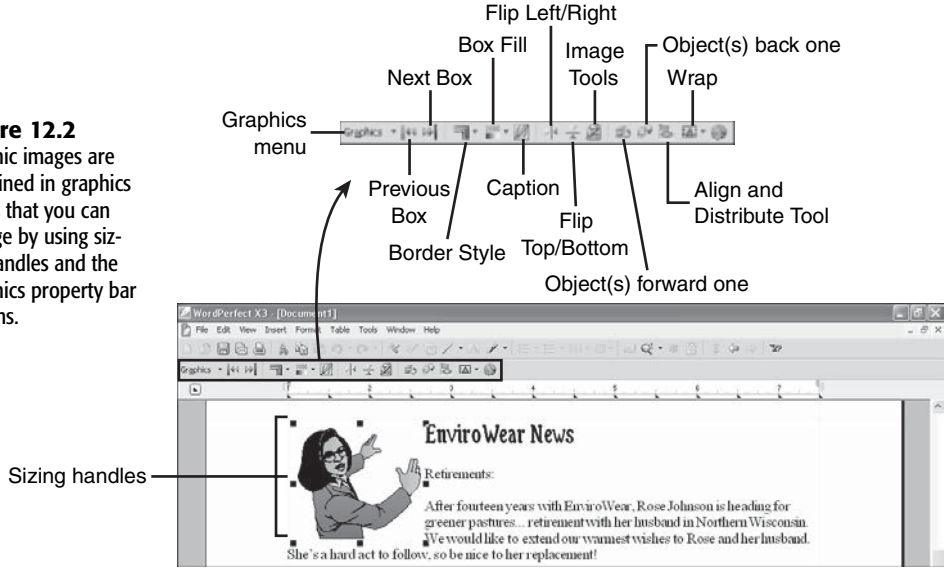

Figure 12.2
Graphic images are contained in graphics boxes that you can change by using sizing handles and the Graphics property bar options.

The rectangle that surrounds the image is called a graphics box, and when selected is surrounded by eight black boxes called sizing handles (refer to Figure 12.2). If you click elsewhere in the document, these handles disappear. If you click the image, you select the object, and the sizing handles appear again.

NOTE

Images, and nearly all graphic or other inserted objects, are placed inside graphics boxes. As you work with graphics, you need to remember whether you're working with the graphics box (the container), or with the image (the content) itself. For example, you can change the border style or the size and shape of the box. Independent of any changes you make to the graphics box, you also can change the size and attributes such as brightness or contrast of the image within the box.

If you are unable to delete an image you've inserted, see "Making It Go Away" in the Troubleshooting section at the end of this chapter.

If you are unable to make changes to a graphics box, see "Editing a Graphics Box" in the Troubleshooting section at the end of this chapter.

If you can't seem to select a graphics box, see "Difficulties Selecting a Graphics Box" in the Troubleshooting section at the end of this chapter.

RESIZING AND MOVING GRAPHICS

An inserted image is rarely the right size, or in the right location. To move a box, first select the box by clicking once on the image. Note that the mouse pointer changes to a four-way arrow (see Figure 12.3), which indicates that you are about to move the object. Drag the image to the precise location you want and release the mouse button to drop the image. You can do this over and over until you place the image exactly at the right spot.

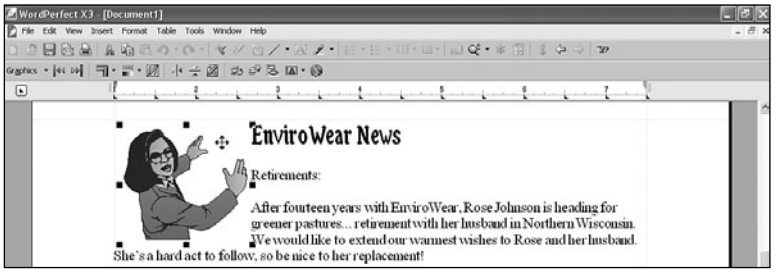

Figure 12.3
You can use the mouse to drag images and drop them where you want them.

CAUTION

> Be careful not to double-click an image. Double-clicking any graphics box enables you to edit the contents of the box. If you double-click an image, you open WordPerfect's graphics editor. If this happens by mistake, simply click outside the graphics image area (for example, in the text) and start over.

To modify the size of the graphics box, use the sizing handles. Point at any of the corner sizing handles, and the mouse pointer turns into a two-way diagonal arrow. Click and drag the sizing handle toward the center of the image to make it smaller, or away from the image to make it larger. Using the corner sizing handles also forces the image to grow or shrink proportionally.

To change the size of the graphics box, and also distort the image it contains, point at any of the four sided handles so that the mouse pointer turns into a vertical or horizontal two-way arrow. Click and drag the handle to change the shape of the box. You can create some very interesting effects by using the side handles, such as short, fat giraffes, or long, skinny pigs!

SETTING BORDER, WRAP, AND FILL OPTIONS

Although the graphics box takes up rectangular space in your document, you might want to add a border to set it off more clearly from your text. To add a border to your graphics box, follow these steps:

1. Select the image by single-clicking it. The sizing handles indicate the box you selected.
2. Click the Border Style button on the property bar to display a palette of border styles (see Figure 12.4).

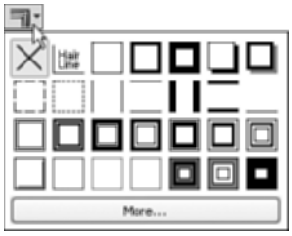

Figure 12.4
You can add a variety of border styles to graphics boxes.

3. Click the border you want to use. WordPerfect adds the border to the graphics box (see Figure 12.5) .

Figure 12.5
A border around your image helps set it off from the text.

TIP FROM

Read Gilgen

Don't forget that simply hovering the mouse pointer over the style on the palette for a moment enables you to preview the style in the document before you actually select it.

In addition to borders, you can create a background for the box, which fills the box behind the image. WordPerfect calls this a fill pattern. With the graphics box selected, click the Box Fill button on the property bar and choose a fill pattern from the palette (see Figure 12.6).

Using predefined borders and fills is a good place to start. But as you become more experienced with what looks good, you can customize your graphics boxes to make them more distinctive.

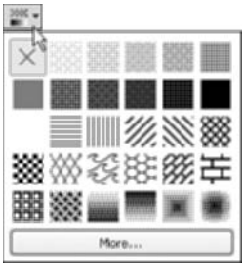

Figure 12.6
You can fill in the background behind an image with a variety of fill patterns, including gradient shading.

Notice the More button in Figure 12.4 and Figure 12.6. This is just one way to access the Box Border/Fill dialog box (see Figure 12.7, which shows a border already selected). You can also access this dialog box by clicking the Graphics button on the property bar and choosing Border/Fill; or you can simply right-click the image and choose Border/Fill from the QuickMenu.

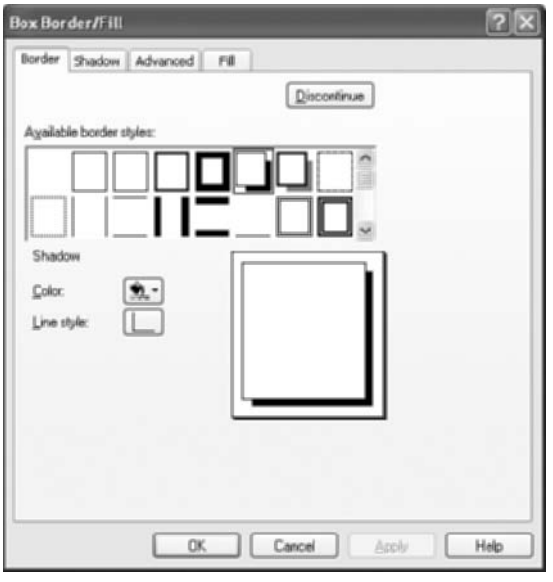

Figure 12.7
The Box Border/Fill dialog box gives you greater control over the properties of your graphics box.

TIP FROM

Read Gilgen

Don't forget that nearly anything that's available on the graphics property bars is also available on the QuickMenus. If you get used to right-clicking graphic objects to access graphics tools, you can save yourself lots of time.

On the Border tab of the Box Border/Fill dialog box, you find the same palette of styles you find behind the Border Style button on the property bar. The default style is to include a bit of spacing between the image and the text, without any line. Here you can choose a

different line style, and click Color to select a line color from a palette. Clicking the Discontinue button appears to have the same effect as clicking the `<None>` style in the upper-left corner of the list, but it also turns off any other Border/Fill options you may have selected.

The Fill tab offers the same palette of choices you find on the property bar, except that you can choose separate background and foreground colors for patterns, and start and end colors for gradient shading.

The Advanced tab enables you to further customize your borders and fills (see Figure 12.8, which has several changes already made). Custom options include the following:

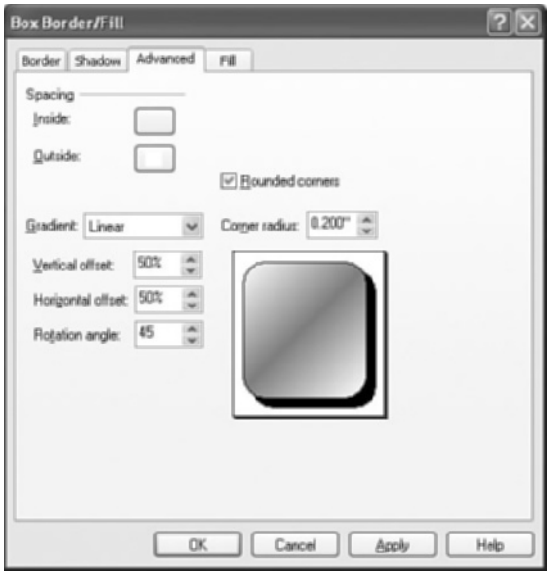

Figure 12.8
You can fine-tune spacing, corners, and gradient shading in the Advanced tab of the Box Border/Fill dialog box.

- You can change the amount of space between the border and the image by changing the inside spacing. Select a predefined spacing amount from the spacing palette, or specify an exact measurement in the spacing palette text box, as shown in Figure 12.9.
- You can choose rounded corners for the box, and you can even specify how round the corner radius should be.
- You can modify the style and angle of your gradient shading.

The Shadow tab enables you to add an offset shadow to the graphics box in any direction (see Figure 12.10). Begin by choosing the general direction of shadow you want; then, use the scrollbars or the counter boxes to specify the exact shadow height and shadow width. You can also change the shadow color.

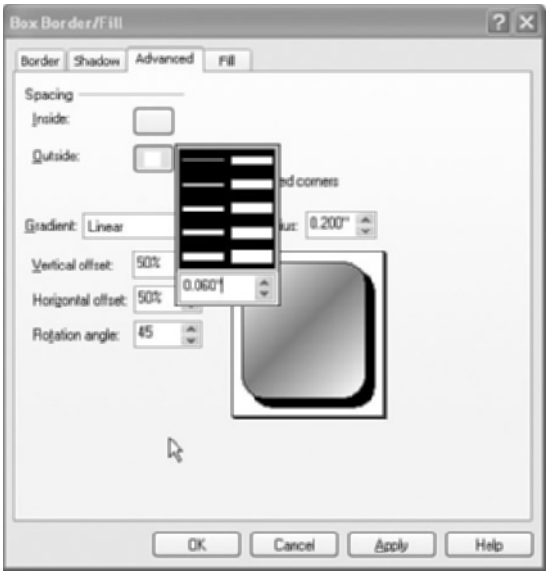

Figure 12.9
The Spacing palette helps you set just the right amount of space between your image, the text, and the surrounding box.

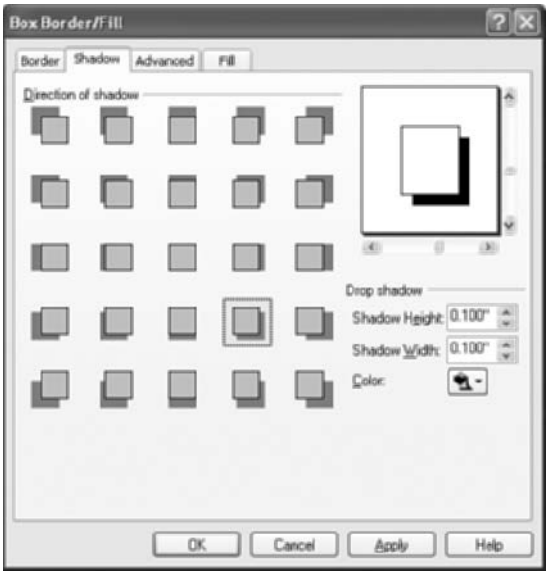

Figure 12.10
The Shadow tab of the Box Border/Fill dialog box enables you to create attractive drop shadows.

By default, text wraps around both sides of a graphics box. If you want to change the way it wraps, click the Wrap button on the property bar (see Figure 12.11). Point at each menu option and observe the effect on the text surrounding the graphics box. Click an option to apply it to a graphics box.

➔ To learn what all the text wrap options mean and how to use them, **see** "Making WordPerfect Text Work with Graphic Objects," **p. Web:2**.

➔ To see how to use graphic objects, **see** "Customizing Graphic Images," **p. Web:18**.

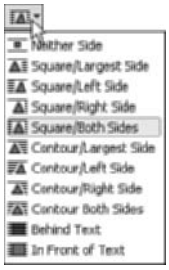

Figure 12.11
WordPerfect enables you to wrap text around your graphics nearly any way you want.

USING THE SCRAPBOOK

Increasingly, WordPerfect users are depending on scanned or imported digital images to illustrate their documents. However, WordPerfect's clip art collection is extensive, and WordPerfect's Scrapbook is a power tool for organizing and finding just the right graphic image for your document.

You access the Scrapbook by choosing Insert, Graphics, Clipart, or by clicking the Clipart button on the toolbar. WordPerfect displays the Scrapbook (refer to Figure 12.1).

NOTE

> The Scrapbook itself does not contain graphic images, but instead is a catalog of images available for you to use.

TIP FROM

> When searching for images, maximize the Scrapbook Screen before scrolling through the displayed images. WordPerfect has to open each image from its source location, which can cause delays in displaying the images. Also, when possible, go directly to a category instead of scrolling through [All Categories].

By default, the WordPerfect Scrapbook displays the basic collection of installed clip art images. The other tabs in the dialog box display installed photographs, sound files, and video clips.

Although you can scroll through the collection to find the image you want, you can also use the Find feature to search for images based on filenames or keywords. To find a Scrapbook item, click Find. WordPerfect displays the Find Scrapbook Item dialog box (see Figure 12.12) .

You can search for images in the Scrapbook using Keywords, filenames (if you know them), or by graphic image type, such as WordPerfect graphics (.wpg), or Internet graphics (.jpg, or .gif).

Figure 12.12
The Find Scrapbook Item dialog box helps you search for images using keywords, filenames, and file types.

If you're really intrepid, you can even add keywords to WordPerfect's images or to your own by clicking Options, Item Properties, to access the Scrapbook Item Properties box (see Figure 12.13). You can also use this dialog box to organize your images into categories of your own choosing.

Figure 12.13
Use the Scrapbook Item Properties box to add keywords or to assign an image to one or more categories.

Finally, you can import individual graphic images to your Scrapbook, as well as clip art collections from earlier versions of WordPerfect. You can also import non-WordPerfect clip art, including Internet images or digital photographs.

NOTE

Importing images to the Scrapbook does not actually place the file for that image in the Scrapbook. Instead, WordPerfect merely inserts a cataloged reference back to the original file. If the file later becomes unavailable, the cataloged Scrapbook image remains, but a large red X on the graphics means that you cannot open the actual image from the Scrapbook.

NOTE

> If you select several images to import at one time, WordPerfect asks whether you want to set properties for each item. Unless you are importing relatively few images, answer No, and set image properties later. Otherwise, you are stuck either setting the properties or having to click Cancel for each and every imported image.

WordPerfect 7 and 8 also shipped with useful graphics that you can easily import into your WordPerfect Scrapbook. Such collections typically come in a single file that ends with the .scb filename extension. However, WordPerfect 9's clip art must be imported one image file at a time if you want to include them in your WordPerfect Scrapbook.

The clip art collections found in WordPerfect 10, 11, 12, and X3 are identical, so there is no need to import images from these versions, for example, from 10 to X3.

USING CD CLIP ART

When you install WordPerfect, by default, only a handful of images are actually copied to your computer (or to your network). The rest of WordPerfect's extensive collection, including some 10,000 clip art images, remains on your CD-ROM.

NOTE

> Prior to version 10, WordPerfect shipped with a printed catalog of available clip art images. Since WordPerfect 10, you can find a PDF-formatted electronic catalog on the second CD-ROM. You must use Adobe Acrobat Reader (also included) to view or print these pages.

To use the CD clip art, follow these easy steps:

1. Insert the CD-ROM that contains the graphic images (usually disc 2).
2. If the CD automatically displays an installation screen, close it.
3. Open the Scrapbook. WordPerfect automatically finds the graphics on the CD and adds several new categories to your scrapbook (see Figure 12.14) .
4. Click a category, and then select and insert a graphic image as you usually do.

TIP FROM

Read Gilgen

> If you'll be accessing the Scrapbook often, don't close it after inserting an image. Instead, minimize the Scrapbook and then click the Clip Art button on the toolbar to return to the Scrapbook. That way, any CD-based images you might have viewed remain active, along with their keywords.

You should be aware of the following when using CD clip art:

- When the CD is in the CD-ROM drive, all CD images are available. If the CD is removed, the categories and the images from the CD disappear.

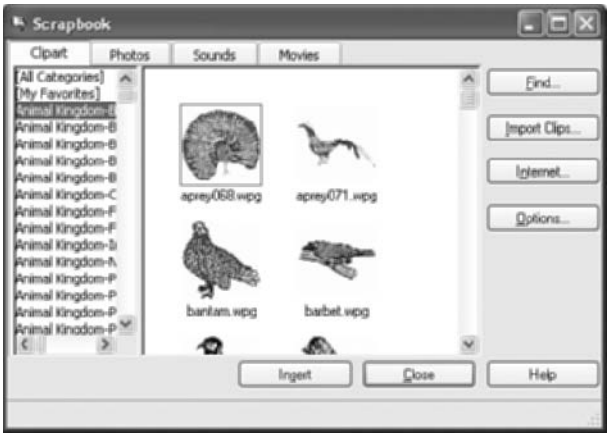

Figure 12.14
When the Clip Art CD is inserted, the Scrapbook displays several new categories and thousands of new clip art images.

- You cannot change the item properties for CD images. However, you can copy a CD image to one of your own categories where you can then change the properties.
- If you want to use the CD images from your hard drive or from a network drive in the Scrapbook, you must import the individual graphic images.
- If you're using a network version of WordPerfect, you should ask your system administrator to copy the clip art folders to a network drive that is accessible by everyone.

NOTE

You can copy the CD images to your hard drive and make them work automatically with the Scrapbook, but the process is tricky and involves modifying the Windows Registry. Go to the Corel Web site and search the Corel Knowledge Base for the word "Scrapbook" to find more information. At the time of this writing, Article 206652 covered this topic.

Unless you're comfortable editing the Windows Registry, you are better off just making sure the CD is available and inserted in your CD-ROM drive when you are working with the Scrapbook.

IMPORTING CLIP ART AND OTHER GRAPHIC IMAGES

One of WordPerfect's strengths is its capability to import graphic images from a variety of sources. WordPerfect clip art is in the .wpg (WordPerfect Graphics) format, but there are many different graphic formats in use today. You can insert most types of graphic formats from other programs, as well as photographs from scanners or from digital cameras.

INSERTING OTHER GRAPHIC TYPES

To directly insert a graphic image other than WordPerfect's clip art images, choose Insert, Graphics, From File. WordPerfect opens the Insert Image dialog box, which is identical to the Open File dialog box. You can use this dialog box to browse to various graphic files.

NOTE

If you use the preview box in the Open File dialog box, you'll find that it does not display any file type other than WordPerfect graphics (.wpg). However, WordPerfect does import a wide variety of graphic types. If you're not sure whether you can import a certain image type, just try it and see what happens.

When you identify the file you want, select it and click Insert. WordPerfect automatically converts and imports a wide variety of graphic file types, which often can be identified by their filename extensions. However, it's quite unlikely that you'll run across many of these graphic file types. Besides the .wpg format (WordPerfect Graphics), some of the most common formats are those associated with the Internet (.gif, .jpg) or with digital cameras (.jpg, .tif). On the other hand, it's nice to know that if you need to use an unusual graphics format, WordPerfect is up to the task.

NOTE

WordPerfect graphics are *vector* graphics because they are created by drawing lines between reference points, or vectors. If you move the vectors, the lines change, but they also remain smooth because they're being drawn from one point to another. Other programs, notably paintbrush-type programs, create *bitmap* graphics by filling in areas with dots, or bits. If you change the size of a bitmap image (for example, to make it larger), you often see jagged edges because WordPerfect can't fill in the missing dots.

Whenever possible, save and use graphics in a vector format because these give you the greatest flexibility as you size them for your document.

TIP FROM

Read Gilgen

You can also import nearly any kind of graphic image into your Scrapbook, including .jpg and .gif Internet images, or photographs that have been scanned or that come directly from a digital camera. Such images are placed on the Photo tab of the Scrapbook, not on the Clipart tab.

INSERTING GRAPHICS FROM A SCANNER

One great way to obtain images for documents is to use a scanner. For example, you can scan family photos directly into a WordPerfect document to put together a book of memories.

You first set up WordPerfect to interact directly with your scanner and then scan the picture. Follow these steps, which are typical for most scanners:

1. Choose Insert, Graphics, Select Image Source. WordPerfect displays the list of scanners connected to your computer in the Select Source dialog.
2. Choose the device that matches your scanner and click Select.
3. Make sure your scanner is connected to your computer and is turned on.
4. Place the item to be scanned on the scanner.

5. Choose Insert, Graphics, Acquire Image. WordPerfect starts your scanning software.
6. Scan a preview image, make adjustments as necessary, and then make a final scan.

NOTE

> The software for each scanner varies, and so do the specific procedures. Most, however, are relatively simple to understand and use.

7. WordPerfect deposits the scanned image directly in your WordPerfect document (see Figure 12.15 for an example of a scanned image). You can move or size the image, add borders, or modify the image by using image tools.

Figure 12.15
Scanned images, such as photos, fit nicely in WordPerfect documents.

TIP FROM

Read Gilgen

> The Contrast and Brightness controls in the Image Tools dialog box are particularly useful for lightening or darkening scanned photographs.

If you're having trouble making scanned images look good in WordPerfect, see "Choosing the Right Size for Scanned Images" in the Troubleshooting section at the end of this chapter.

INSERTING GRAPHICS FROM THE INTERNET

Another great source for graphic images is the Internet. Web sites contain graphic images that might be just what you need. Some sites offer collections of free buttons, lines, and other kinds of clip art.

CAUTION

> Just because images can be downloaded from the Internet does not mean they are free. Copyright laws and restrictions apply to Internet graphics as they do to print graphics. If you aren't sure whether you can use a graphic image, you should ask the owner of the Web site that contains the image.

To use an image from an Internet Web site, follow these steps:

1. In your Internet browser, right-click the image you want to download.
2. From the pop-up menu, choose Save Image As, or Save Picture As.
3. Provide a name and local destination (for example, c:\My Documents\My Pictures\webimage.jpg). Use the same filename extension as used on the Web site—for example, .gif or .jpg.
4. Click OK to save the image.
5. Switch to WordPerfect and choose Insert, Graphics, From File.
6. Browse to the location where you saved the image, select the image, and choose Insert.

WordPerfect converts the image from the Internet format (.gif or .jpg) and places it in the document (see Figure 12.16 for an example of an Internet image, at both normal and enlarged sizes). You then can move or size the image, or add borders.

Figure 12.16
Graphics captured from the Web also import nicely into WordPerfect. Note, however, that small Web graphics, when enlarged too much, begin to display jagged edges.

NOTE

Try to capture and use imagesthat are close to the size you want. Small images, when enlarged in WordPerfect, tend to look jagged. Larger images, when made small, sometimes lose critical parts. This is the nature of bitmapped graphics, and beyond choosing the right size to begin with, there really is nothing you can do to improve the quality of the image.

TIP FROM

Read Gilgen

When you right click a Web page image, you sometimes have the choice of copying the image. If so, you can copy the image, and then paste it directly into your WordPerfect document. If you want to save the image, however, follow the procedures described here.

➔ For more information on modifying a bitmap image, such as brightness, contrast, or cropping, **see** "Using Image Tools," **p. Web:19**.

➔ For more information on editing bitmap images, such as scanned images or images from the Internet, in WordPerfect's Presentations program, **see** "Editing Bitmap Graphics in Presentations," **p. 808**.

USING LINES AND BORDERS

Although images are the most obvious graphic elements one adds to a document, other elements such as lines and borders also add visual impact and help organize the text in the mind of the reader. Horizontal lines can help identify divisions or sections of text—for example, a horizontal line that separates the heading information of a memo (TO:, FROM:, and so on) from the message of the memo. Vertical lines help the reader follow the flow of text—for example, in the columns of a newsletter.

INSERTING HORIZONTAL AND VERTICAL LINES

To insert a horizontal line that extends from one margin to the other, simply place the cursor where you want the line, and choose Insert, Line, Horizontal Line, or press Ctrl+F11. WordPerfect places a thin, single, black line in your document (see Figure 12.17). Because the line is a graphical line, not based on text characters, it fits perfectly between the margins even if you later change the margins or the font of the document.

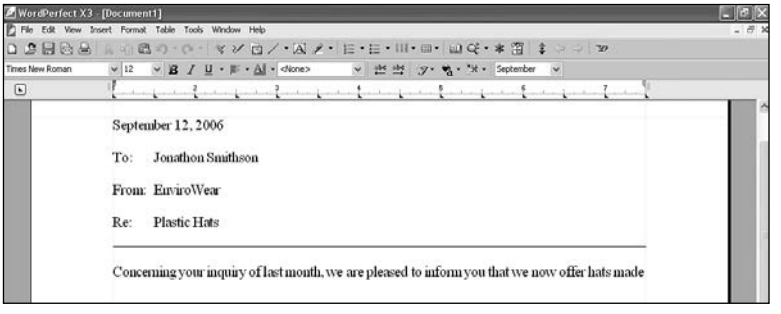

Figure 12.17
Easy to add, horizontal lines help separate sections of text.

Inserting vertical lines works the same way. Simply position the cursor where you want the vertical line (for example, at the left margin), and choose Insert, Line, Vertical Line, or press Ctrl+Shift+F11. WordPerfect inserts a thin, single, black vertical line in your document that extends from the top to the bottom margins. Note, however, that because the vertical line sits nearly on top of the text, this default location is not terribly useful.

Fortunately, you can easily create custom lines that are any length, size, or color, and that you can place anywhere in the document. Because lines are graphic objects, you can also move and edit default horizontal or vertical lines.

To move a line (for example, you could move a vertical line just to the left of the left margin), follow these steps:

1. Move the mouse pointer toward the line until it changes to an arrow.
2. Click the line to select it. WordPerfect treats the line just like it does any graphics box. Sizing handles appear, and the mouse pointer changes to a four-way arrow (see Figure 12.18) .

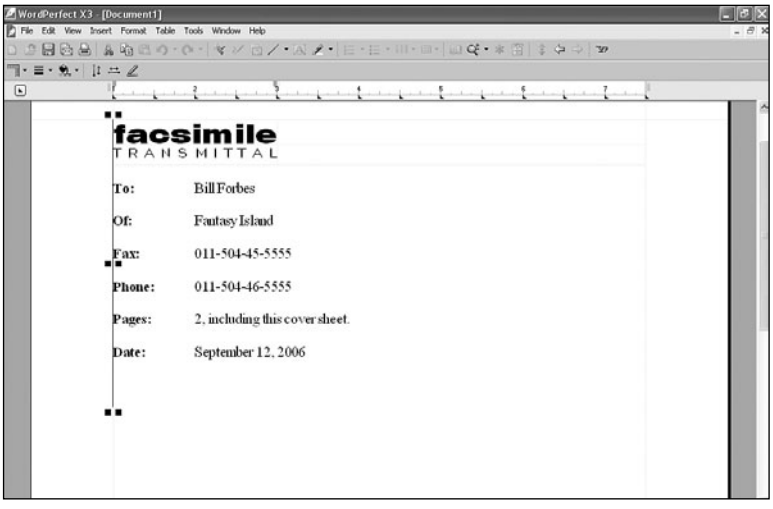

Figure 12.18
If you select a graphic line, you can move and size it the same way you do any graphic image.

3. Drag the line to the new location (for example, about 1/10 inch to the left).
4. Click anywhere in the text to deselect the line.

Indeed, you treat graphic lines as you do any other graphic object. Here are some examples:

- To delete a line, simply select it and press Delete or Backspace.
- To change the size or shape of a line, drag the sizing handles. For example, to make a thicker line, drag any of the sizing handles from the center of the line until you see the size you want. By default, WordPerfect creates a solid black line.
- To edit a line, right-click it and choose Edit Horizontal (or Vertical) Line from the QuickMenu, or simply double-click the line. Alternatively, you can select the line and choose Edit, Edit Graphic Line from the menus.

Whether you choose to edit an existing line or to create a custom line, the dialog box and the options are the same. Choose Insert, Line, Custom Line, and WordPerfect displays the Create Graphics Line dialog box, which is identical to the Edit Graphics Line dialog box you get if you choose to edit an existing graphics line (see Figure 12.19).

Figure 12.19
You can create a custom line length, thickness, or color by using the Create Graphics Line dialog box.

In the Create Graphics Line dialog box you can create a vertical or horizontal line, and preview the results before inserting the line into your document. Options for creating or editing a horizontal graphic line include palettes of line styles, colors, thickness, or how much space should appear between the line and the text surrounding it, and an option for specifying line length. Options for editing vertical lines, such as those found between text columns, are similar but you can also specify horizontal and vertical locations, and a Border Offset—how much space appears between the line and the text to its right.

➔ To learn more about creating newspaper style columns, **see** "Setting Up Columns," **p. 212**.

TIP FROM

Read Gilgen

If you want to create different lines between each of the columns (for example, one thick line and one thin line) or otherwise customize the lines between columns, use this Custom Line feature. However, if all you want is single thin black lines between your columns that extend from the top to the bottom margins, choose Format, Columns, Border/Fill to access the Columns Border/Fill dialog box. Then choose the Column Between style. No fuss, no muss.

ADDING BORDERS TO PARAGRAPHS AND PAGES

You can apply line styles to surround text paragraphs and document pages. These text borders are very similar to borders used for graphics boxes. Unlike lines you insert, borders are styles you apply to various WordPerfect elements such as text paragraphs and columns. The information on customizing borders in the section "Setting Border, Wrap, and Fill Options," earlier in this chapter, applies also to text and page borders.

➔ For more information on adding line borders to paragraphs, **see** Chapter 7, "Formatting Lines and Paragraphs."

➔ For more information on adding line borders to pages, **see** "Adding Borders Around Pages," **p. 218**.

INSERTING SHAPES

WordPerfect's graphic shapes can be extremely useful, and fall into three basic categories. Although each has similar characteristics, you create, edit, and manipulate each slightly differently:

- **Lines**—Each of the line types has a beginning and end, and you can even add arrow heads or tails to them.
- **Closed shapes**—These include boxes, circles, action buttons, and specialty shapes.
- **Callout shapes**—These are similar to closed shapes, but they also enable you to add text in them to make it easier to create callouts.

You can access the full range of WordPerfect shapes by choosing Insert, Shapes and working from the Draw Object Shapes dialog box (see Figure 12.20).

Figure 12.20
The Draw Object Shapes dialog box offers a complete array of graphic shapes, but it is a bit more clumsy to use than the toolbar button.

However, a quick and easy way to access more commonly used shapes is to click the Draw Combined Shapes button on the WordPerfect toolbar.

NOTE

> The Draw Combined Shapes initially looks the same as the line button on the Graphics toolbar. However, as you select a different shape—for example, a star—that shape appears on the button. Also, the Draw Combined Shapes button gives you access to all of WordPerfect's shapes, not just lines.

The following sections concentrate on the Draw Combined Shapes button. You'll probably want to use the menu option as well to explore the full range of graphic shapes.

ADDING LINE SHAPES

To examine available on the Draw Combined Shapes button, click the drop-down arrow on the right side of the button. WordPerfect then displays a palette of choices (see Figure 12.21). These include several line styles, closed objects, and callout styles.

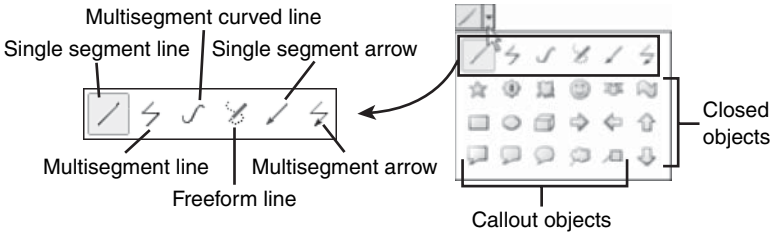

Figure 12.21
The most commonly used graphic shape types are included on the Draw Combined Shapes button on the toolbar.

To draw a line shape on your document, follow these steps:

1. Click the line style you want to use from the Draw Combined Shapes palette (refer to Figure 12.21). WordPerfect displays the icon for that style on the button, and the button appears to be selected.
2. Move the mouse pointer to the text area and note that it is a crosshairs shape.
3. Position the pointer where you want the line to begin.

TIP FROM

Read Gilgen

These procedures are used for creating both lines and arrows. You can save time by always starting lines at the tail of the imaginary arrow, and ending them at the arrowhead.

4. Click and drag to the opposite end of the line.

TIP FROM

Read Gilgen

You can draw a line from a center point by holding down the Ctrl key while you drag your line. As you drag away from the center point, the line extends an equal distance in the opposite direction.

TIP FROM

Read Gilgen

You can constrain your lines to 15-degree angles by holding down Alt+Shift while you drag the line. Thus, your lines can be perfectly aligned horizontally, vertically, or at 15, 30, or 45 degrees, and so on.

5. If you're creating a single-segment line or arrow, release the mouse button to add the line on top of your text.

For other line types, the procedures vary slightly:

- If you're creating a multisegment line, click to change directions. Drag to the next juncture and click. Continue until you reach the end; then, double-click the mouse to complete the line.

- If you're creating a multisegment curved line, click each time you want to start a new curve. As you drag the mouse in a new direction, note that WordPerfect rounds the line on both sides of the point that you click. To complete a curved line, double-click.
- Freeform drawing works just like drawing with a pencil. Click and drag in any direction, and WordPerfect draws a line to match. Release the mouse button to complete the line.

TIP FROM

Read Gilgen

> You can draw freeform segments of multisegment lines or arrows by holding down the mouse button instead of releasing it before you change directions. When you want to resume straight lines again, release the mouse button.

After you complete your line shape, note that WordPerfect places the shape in a graphics box, complete with sizing handles (see Figure 12.22). The shape also covers any text or other objects that lie beneath it. You can adjust the size of the box or move the box as needed.

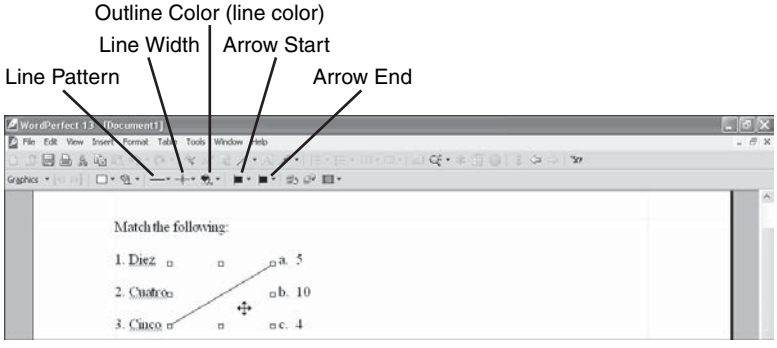

Figure 12.22
With a graphic shape selected, the Graphics property bar helps you modify the properties of the shape.

CAUTION

> If you add several shapes or objects in the same area, it can become difficult to accurately select and move or modify some of the objects. If this happens, simply right-click where you think the object is, choose Select Other from the QuickMenu, and select the object you want.

The graphics property bar (refer to Figure 12.22) enables you to choose line patterns, colors, and arrowheads, and to choose fill styles and colors for closed shape objects.

By default, graphic shape objects lie on top of your text, layered in the order you create them. If you want a shape to appear behind the text, or behind another shape, simply select the shape and then click the Objects Back One button. To move a shape in front of another object, click the Objects Forward One button.

Also, unlike other graphic images, text does not automatically wrap around shapes, but instead the shapes appear in front of the text. Click the drop-down arrow on the Wrap button to choose a different wrap method.

ADDING CLOSED OBJECT SHAPES

The lines of closed object shapes come together, such as in a circle, and thus their inside area is closed. By default, such objects are drawn with thin single lines and are filled with an aquamarine-like green color (your results may vary).

You draw closed shapes differently from the way you draw open shapes. Let's use a five-point star to illustrate the procedure:

1. Click the drop-down palette on the Draw Combined Shapes button to display the list of available shapes (refer to Figure 12.22).
2. Click a closed object, such as the five-point star. WordPerfect displays the star on the button, and the pointer turns into crosshairs.
3. Position the pointer at one corner of the area you intend to fill with the shape (for example, the upper-left corner).
4. Click and drag the pointer to the opposite corner (for example, the lower-right corner).
5. Continue holding the mouse button while you move the pointer, until you have exactly the right size and proportions.

TIP FROM

Read Gilgen

If you hold the Shift key down while dragging the mouse, WordPerfect constrains the object to be symmetrical—for example, a circle instead of an oval or a square instead of a rectangle.

6. Release the mouse button to place the object on the document (see Figure 12.23).

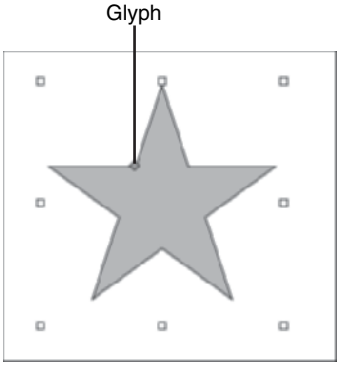

Figure 12.23
Closed object and callout shapes are filled with color. Note the glyph, which is used to change the style of a graphic shape.

If the object has one or more glyphs, which are small pink-colored diamond handles, you can manipulate the shape or the perspective of the shape. For example, on the five-point star, you can drag the glyph toward the center of the object to create a skinny starfish look. You can drag it away from the center to create a fat sheriff's star look.

The glyphs on a circle (oval) enable you to create a partial circle, a pie shape (with a missing piece), or an open arc (see Figure 12.24). Drag the glyph around the edge of the circle. When you release the mouse button, a small gray square appears in the middle of the circle. Click it once to create a pie, click it again to create an arc, or click it again to close the partial circle.

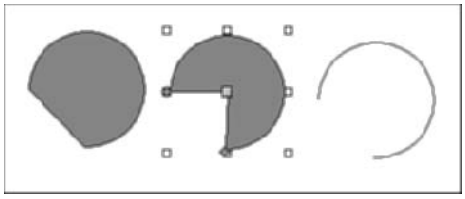

Figure 12.24
You can drag the circle glyph and click the center box for three different partial-circle effects.

You can, of course, use the sizing handles to further change the shape or size of the object, and you can move the object to the exact location where you want it.

In addition, with the shape selected, WordPerfect also displays the graphics editing tools on the property bar (refer to Figure 12.22). The buttons are the same as those used for lines, except that the Arrow Start and End buttons are replaced by the Fill Style palette and buttons to change the foreground and background fill colors.

TIP FROM

Read Gilgen

If you want to create a contoured area around which text wraps—for example, to reserve space for something you must paste into the printed copy—you can create a closed object shape. Then, change the wrap option to contoured, both sides; change the line style to none; and change the fill color to white.

NOTE

Although you can make many changes to the properties of closed objects from the property bar, you have more precise control and more options by double-clicking the object and using the Object Properties dialog box.

ADDING CALLOUT SHAPES

Callout shapes are similar to closed object shapes, and are created by following the same procedures. The difference is that after you create a callout, WordPerfect also creates a text box inside it, where you can type text to go along with the callout (see Figure 12.25).

You can create a callout in several ways:

- Type text to fill in the callout text box. By default, such text is centered both horizontally and vertically, but you can change the text just as you do other text in your document. For example, you can change the alignment or change the font or color.

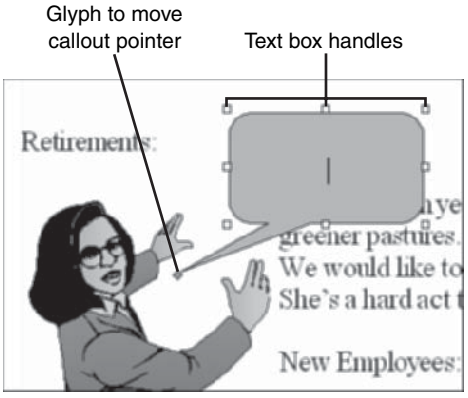

Figure 12.25
A callout is a closed object shape with a text box.

- Use the sizing handles to change the size of the callout area. If what you type exceeds the space of the callout area, WordPerfect does not automatically expand the box, so you need to use the sizing handles to resize the area.
- Reorient the callout pointer. Drag the glyph at the end of the callout pointer to any side of the callout, and stretch the pointer until it's directed at the callout source (see Figure 12.26).

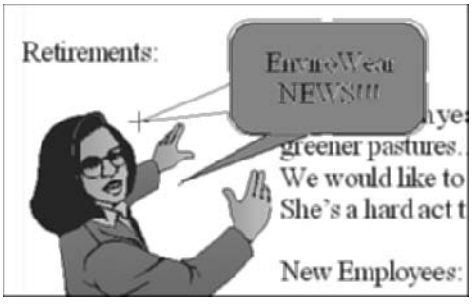

Figure 12.26
You can move the callout pointer to any side of the callout by dragging the glyph.

NOTE

You might have to deselect the callout and select it again to get the crosshairs pointer you need to move the callout glyph (refer to Figure 12.26).

- Use other options on the property bar to modify the callout object. For example, you can change the fill pattern or color, position the callout behind text by changing the wrap option, and so on.
- Right-click the object and use the QuickMenu for other tools, such as wrap, position, or size.

TIP FROM

Read Gilgen

> Instead of using new text in a callout text box, you can position the callout so that it encloses text already in the document. If you simply want to see through the callout to the text behind, turn off the fill pattern. If you want to keep the fill pattern and still see the document text, change the callout's wrap option so that it appears behind text.

USING WATERMARKS

In expensive bond paper, a watermark in the paper itself lends a distinctive look. Hold a piece up to the light, and you see an image—perhaps along with words—that helps identify the paper brand or content. WordPerfect watermarks also add a distinctive look by adding a lightly shaded graphic image behind the text of your document.

Watermarks are extremely easy to create:

1. Position the cursor at the beginning of the document.

NOTE

> Watermarks function like headers in that they appear on every page, beginning at the page where you insert the watermark code, continuing until you turn off the watermark.

2. Choose Insert, Watermark. WordPerfect displays the Watermark dialog box (see Figure 12.27).

Figure 12.27
You can use the Watermark dialog box to create or edit background watermark graphics.

3. If this is a new watermark, and the first one you've created in this document, choose Watermark A, and click Create. WordPerfect next displays a blank, full page where you create or edit the watermark graphic. Figure 12.28 shows what the Watermark screen looks like after you have added a watermark.
4. You can use graphics from any source that you would use in the document itself. For example, you can click the Clipart button to access the Scrapbook and insert a clip art image.

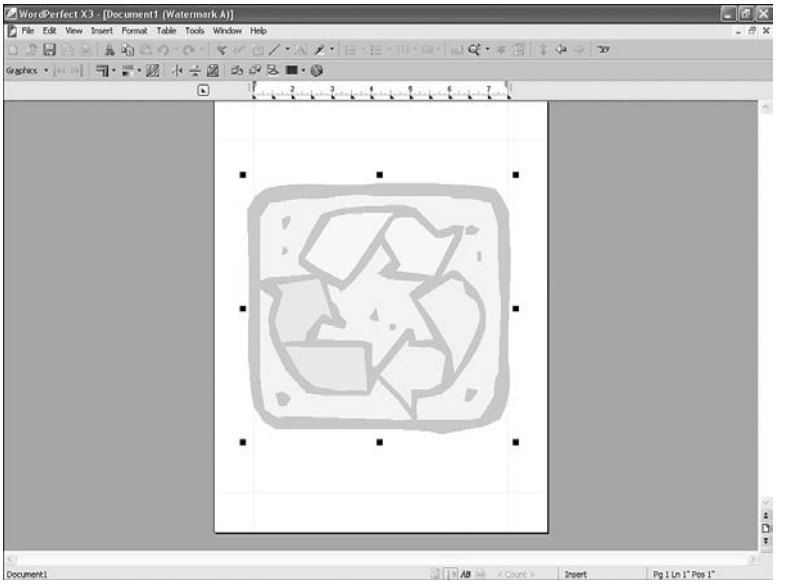

Figure 12.28
A watermark image is text or a graphic image, displayed at 25% brightness.

Note that the graphics box, complete with sizing handles, fills the entire page. The image itself is shaded lightly so as not to interfere with the text that will appear on top of it. You can size and position the graphic image just as you do any other graphic image, using the mouse and the sizing handles.

Click outside the graphics box area (in the margins, for example), and WordPerfect displays on the property bar the following options for modifying the watermark (see Figure 12.29) :

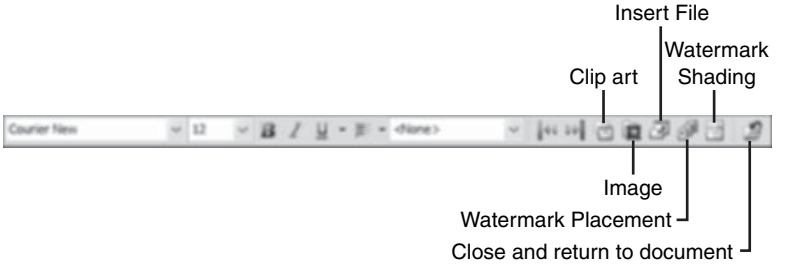

Figure 12.29
The Watermark property bar helps you modify a watermark graphic.

- You can add other images, and size and position them by clicking the Clipart, Image, or Insert File buttons.

- You can choose whether to place the watermark on odd pages, even pages, or both, by clicking the Watermark Placement button.

- You can change the shading of the watermark by clicking the Shading button. By default, both text and graphic watermarks are shaded only 25% of their full color (or darkness).

CAUTION

> Rarely do you need or want to make a watermark darker. Doing so usually conflicts with document text in front of the watermark. More often, you need to lighten the watermark to make it less conspicuous.

When you're satisfied with the look of the watermark, click the Close button on the property bar. If the watermark graphic is selected (that is, if you can see the sizing handles), you can close the Watermark editing screen by choosing File, Close. WordPerfect then returns you to the document-editing screen and displays the watermark in the background (see Figure 12.30).

Figure 12.30
Watermarks can add attractive, as well as useful, backgrounds to a text page.

USING KEYBOARD-MOUSE COMBINATIONS

When creating shapes, it's easy to think only of using the mouse. However, as noted in several tips throughout this section, you can also modify mouse actions by using the keyboard. Table 12.1 summarizes these shortcuts.

TABLE 12.1 KEYBOARD-MOUSE COMBINATIONS FOR DRAWING SHAPES

Keystroke/Mouse Action	Effect
Shift+Drag	Symmetrical (squares, circles, stars: all closed shapes)
Alt+Shift+Drag	Snap to angle in 15-degree increments
Ctrl+Drag	Shape starts from center and expands outward (lines, closed)
Shift+Ctrl+Drag	Symmetrical shapes starting from the center (closed shapes)

Troubleshooting

Making It Go Away

I inserted the wrong image, but I can't seem to use Delete or Backspace to get rid of it.

WordPerfect does not delete the box code when you backspace or delete unless Reveal Codes is on. You can, of course, turn on Reveal Codes to delete the graphics box code, but an easier way is to click the object to select it. Now, pressing Backspace or Delete does indeed remove the image.

Editing a Graphics Box

I want to edit my graphics box, but can't find the tools I need.

Don't forget that you must first select a graphic image, so that the sizing handles appear, before the Graphics menu and other graphics buttons appear on the property bar. You must deselect it to get back your normal text-editing tools.

Difficulties Selecting a Graphics Box

You tell me to select a graphics box, but for some reason I can't do so.

If you add several shapes or objects in the same area, it can become difficult to accurately select and move or modify some of the objects. If this happens, simply right-click where you think the object is, choose Select Other from the QuickMenu, and select the object you want.

Choosing the Right Size for Scanned Images

I scanned a picture of my family, but it doesn't look very sharp in my WordPerfect document.

Scanned graphics are bitmapped graphics and aren't designed to be enlarged. When you enlarge them, they turn out the way you describe. To get the best picture quality possible, right-click the graphic, choose Size, and set both the Width and Height to maintain proportions. This might reduce the size of the image, but it will make the image look much better. If you need a larger image, you should rescan the image, setting the saved size to match the size you need.

PART V

Integrating Information from Other Sources

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CHAPTER 13

Importing Data and Working with Other Programs

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MOVING INFORMATION IN WINDOWS

In today's office, information is created in a variety of programs. The smartest workers learn how to move and reuse that information, instead of creating it over and over again. In most cases information can be moved easily from one place to another by cutting and pasting. Some information comes in specific, proprietary formats, and must be exported from one format, and imported into WordPerfect in a format that WordPerfect can understand.

USING THE CLIPBOARD

The key to moving data in Windows is the Windows Clipboard. Despite the clever name, the Clipboard really is an area of your computer's memory that is reserved for temporarily holding information you place there. You can retrieve the information and use it wherever you want, as often as you want, until you replace the information with something else or until you turn off your computer.

In WordPerfect, you can cut or copy information in a variety of ways, including by using the Edit menu, the toolbar, the QuickMenu, and keystrokes such as Ctrl+X or Shift+Del to cut, and Ctrl+V or Shift+Ins to paste.

➔ If you need a review of the many ways you can cut and paste in WordPerfect, **see** "Moving and Copying Text," **p. 45**.

Typically, each time you copy or cut information, Windows clears the Clipboard and adds what you've cut or copied. You can, however, add more than one selection to the Clipboard at a time. Choose Edit, Append to add more items to the Clipboard. Then when you paste, WordPerfect pastes all appended items at once.

NOTE

> You can append only text selections to the Clipboard. You cannot append graphics.

When you move text in WordPerfect, you normally also move the formatting codes associated with that text. When you paste the text, you also paste its formatting codes. If the surrounding text happens to have the same formatting, the codes automatically disappear, but if it doesn't, WordPerfect inserts the formatting codes to preserve the original format of the source text, as shown in Figure 13.1.

You can, however, paste the text into your document in a variety of other ways. Choose Edit, Paste Special to access the Paste Special dialog box (see Figure 13.2). You then use this dialog box to paste using the following formats or options:

- **WordPerfect X3 Data**—This option is equivalent to the normal Paste option; it inserts text as native WordPerfect X3 information.
- **Rich Text Format**—Rich Text Format (RTF) is a quasi-standard method for translating some formatting between different programs. For example, although the Bold codes might be different for WordPerfect than they are for Word, RTF uses a Bold code that both can understand.

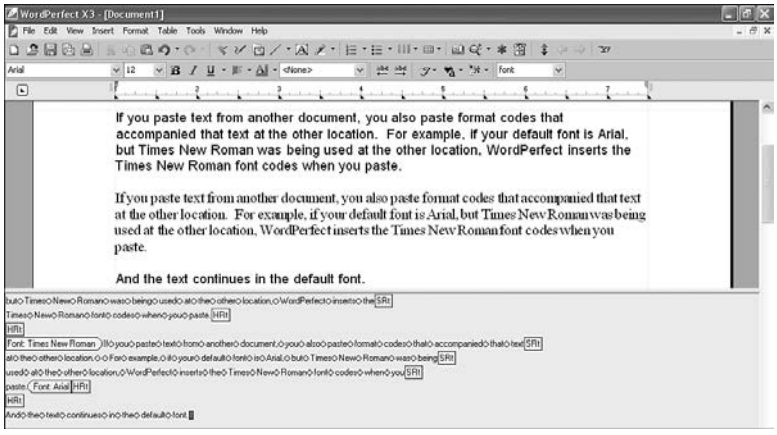


Figure 13.1
Text imported by cutting and pasting often brings formatting codes along with it.

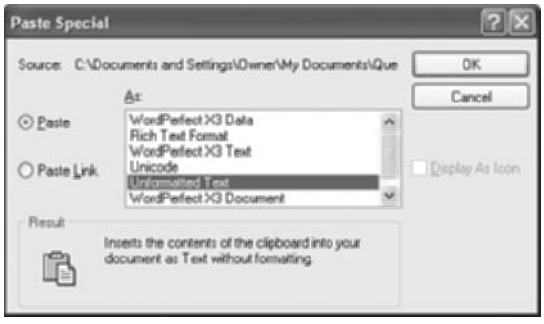


Figure 13.2
For greater control over how you import Clipboard data, use the Paste Special dialog box.

- **WordPerfect X3 Text**—This pastes text without fonts or attributes.

TIP FROM

Read Gilgen

A quick method for pasting WordPerfect X3 Text is to press Ctrl+Shift+V.

- **Unformatted Text**—This option pastes only the most generic version of the selection in your document. All formatting, graphics, and so on are lost. This is, however, an extremely useful option as you bring data from other sources into WordPerfect.

TIP FROM

Read Gilgen

Because pasting unformatted text can be used often, you can access it most easily by right-clicking in the document where you want to paste, and choosing Paste Unformatted Text from the QuickMenu.

- **Unicode**—This is a relatively recent standard for text interchange; it tries to make sure that codes for foreign characters, among other things, are the same in all programs.
- **Picture (Metafile)**—This pastes the contents of the Clipboard into a graphics box. You can then size the box and position it as you do any graphics box (see Figure 13.3).

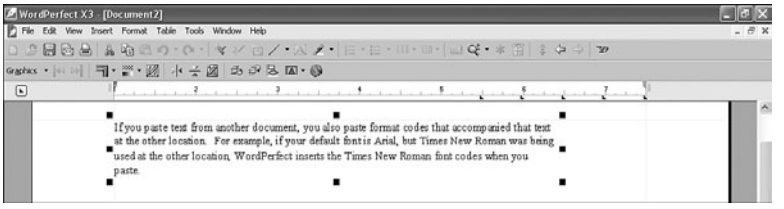


Figure 13.3
You can use the Picture option in the Paste Special dialog box to paste text into a graphics box, which you can then move and size. Note the graphic toolbar and the sizing handles around the text box.

NOTE

> The number and type of options in the Paste Special dialog box can change depending on the source of the information you copy.
>
> For example, text copied from Web pages often contains a variety of style, font, line advance, and other formatting codes applied to every paragraph.

Although you have many options from which to choose, if all you really want to copy is the information itself, without formatting, simply choose the Unformatted Text option.

DRAG AND DROP

One handy yet often overlooked method for cutting and pasting is drag and drop. The procedure is so simple that you often forget to use it. Follow these steps:

1. With the mouse, select the text you want to move.
2. Point the mouse pointer at the selected text so that the pointer turns to an arrow.
3. Click and hold down the mouse button and drag the pointer to the location where you want to paste the text. The mouse pointer appears with an arrow, a piece of paper, and an insertion point to indicate exactly where you will paste the text.
4. Release the mouse button to drop the text in its new location.

The text remains highlighted so you can move it again if you missed your mark. Of course, you can also use Undo. Also, although dragging and dropping has the same effect as cutting and pasting, WordPerfect does not paste a copy in the Windows Clipboard.

➔ For details on cutting, copying, and pasting text, **see** "Moving and Copying Text," **p. 45**.

NOTE

Using drag and drop to move text is best suited for relatively short distances; dragging text from page 1 to page 8, for example, where lots of scrolling is required before you can drop the text, just isn't very practical. Sometimes regular cut-and-paste methods make more sense.

TIP FROM

Read Gilgen

One of the best uses for drag and drop is in tables, where you drag the contents of table cells along with cell formatting. You can even drag entire rows or columns within a table.

COPYING AND PASTING BETWEEN WORDPERFECT DOCUMENTS

As you undoubtedly know, WordPerfect enables you to work with up to nine open documents at a time. Not only can you switch among documents to refer to information in them, but you can easily move information from one WordPerfect document to another. The most obvious method is simply to cut or copy text in one document, switch to another, and paste the text there. Easy. Done.

A not-so-obvious method, but one that is also easy to use, is drag and drop. Note in Figure 13.4 that two document tabs appear at the bottom of the WordPerfect screen. The current (active) document is highlighted (if you're not sure which is active, simply check the title bar for the name of the current document).

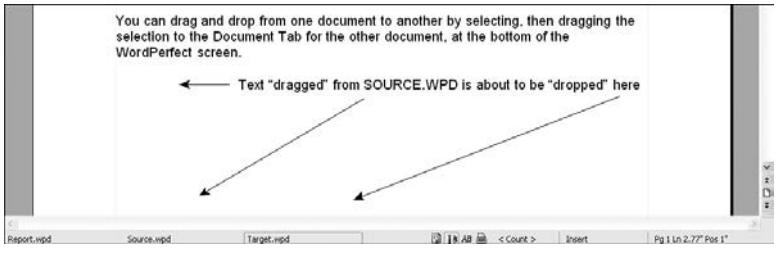


Figure 13.4 Document tabs at the bottom of the WordPerfect screen enable you to switch between documents, and also to drag and drop text from one document to another.

To drag and drop from one WordPerfect document to another, follow these steps:

1. First, go to the target document and position the cursor where you want to paste text. When you return here with text you've dragged from the other document, you don't want to have to scroll to find your target before you can drop the text.
2. Switch to the source document (by clicking the document tab at the bottom of the screen).

3. Select the text (or graphics, or table, and so on) that you want to copy.
4. Click the selection and quickly drag it toward the document tab of the target document.

TIP FROM

Read Gilgen

If you move too slowly toward the document tab, the document begins to scroll, and WordPerfect thinks you want to paste in the current document. If this happens, release the mouse button in the source document (which pastes the selection), choose Undo, and start over again.

5. Hold the pointer on the target document tab until WordPerfect switches to the target document.
6. Move the mouse pointer into the document area and release the mouse button to paste the document where you want it.

Do you sometimes copy and paste something, only to find that the format of what you paste is completely different from where you're pasting it? See "Pasting Unformatted Text" in the Troubleshooting section at the end of this chapter.

COPYING AND PASTING BETWEEN PROGRAMS

The same principles you use when moving information within a program apply when moving information between programs. The Windows Clipboard serves as the great information storage tank, and text, graphics, and even other information can be retrieved and converted so that it can be used in the target program.

Suppose, for example, that you have a paragraph in a Word document that you'd like to use in a WordPerfect document. To move information from one program to another, follow these steps:

1. Open the source program (for example, Word).
2. Select the information you want to move.
3. Cut or copy the selection.
4. Switch to the target program (for example, WordPerfect).
5. Paste the information.

Information you copy from one program to another often carries styles and other attributes from the source program. If you open the Reveal Codes window, as shown in Figure 13.5, you see that WordPerfect inserts style codes, font codes, and other codes to preserve the original formatting of the text from the source document, in this case Word.

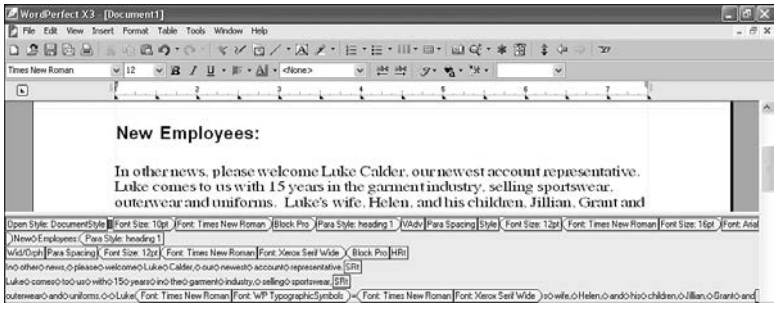


Figure 13.5
Pasting text from Word might also import Word's default format codes.

If you don't want all the formatting, but only the text, simply choose Edit, Paste Special, and then select Unformatted Text. Alternatively, and more easily, right-click where you want to paste and choose Paste Unformatted Text from the QuickMenu.

USING THE CLIPBOOK PROGRAM

The Clipbook feature is a powerful tool included with WordPerfect beginning with Service Pack 2 of WordPerfect 10 (it was not included in the original release of WordPerfect 10). The Clipbook program, installed separately but automatically when you install WordPerfect, enables you to copy multiple text segments and graphics objects, creating customized collections, or clipboards, of clips from which you then can insert individual clips in any Windows document.

The Clipbook thus overcomes the limitation in the Windows Clipboard whereby cutting or copying replaces any previously cut or copied item.

For example, you can assign large chunks of text or graphics to individual keys, making it easy to compose documents by using a couple of keystrokes to retrieve stored components. When used on a corporate network, this enables central control and standardization of important phrases, paragraphs, terminology, letterhead logos, and more in place of individualized QuickWords or QuickCorrect shortcuts.

USING THE CLIPBOOK

The Clipbook is a utility program that you start up by clicking the Windows Start menu and then choosing Programs, WordPerfect Office X3, Utilities, Clipbook. Nothing seems to happen, but a Clipbook icon appears in the System Tray, at the right side of the taskbar. If you double-click the Clipbook icon in the System Tray, the Clipbook appears (see Figure 13.6), with a list of keys and an otherwise completely blank screen, unless you have added items already to the Clipbook.

Figure 13.6
The Clipbook lists keys that cut or copied items can be assigned to.

TIP FROM

Read Gilgen

The Clipbook program is independent of WordPerfect. It thus enhances the basic cut-and-copy procedures of Windows, and can be used with any Windows application.

By default, when the Clipbook program is loaded and the icon appears in the System Tray, using the conventional Windows keys for cutting (Ctrl+X) or copying (Ctrl+C) automatically pops up a Clipbook window that prompts you to select a key where the cut or copied items are to be stored. For example, if you want the item stored under the letter M, you simply press the M key and then press Enter. You can also right-click the key and select Paste. The Clipbook now displays the cut or copied item, along with information about the clip, such as its source, its size, and when it was created (see Figure 13.7).

To paste items from the Clipbook into any Windows application, simply press Ctrl+V. Then, press the key of the item to be pasted.

You can also use the mouse to move information to and from the Clipbook. With the Clipbook open, find the item you can use, click the key letter or number, and drag the item to your document.

Finally, you can also use various cut, copy, and paste methods to move information from one Clipbook key to another.

CAUTION

Dragging an item from the Clipbook is the same as cutting it from the Clipbook. To copy an item, hold down the Ctrl key while dragging it to your application.

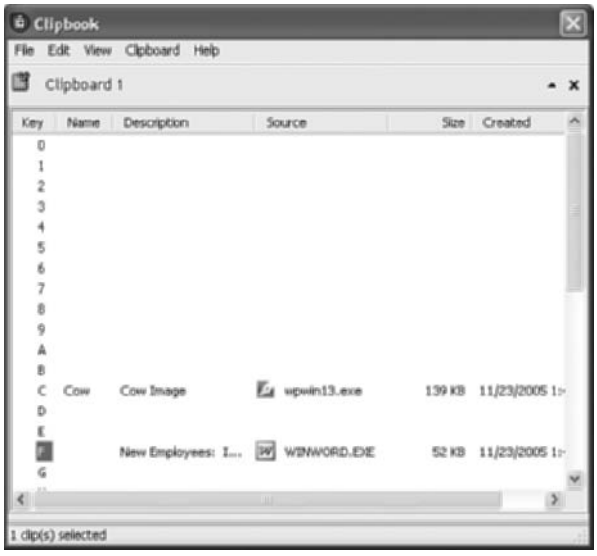


Figure 13.7
The Clipbook displays cut or copied items for the currently selected Clipboard, along with information about their source, size, and when they were created.

You can also right-click any Clipbook key, and then choose Cut, Copy, or Paste to move the information.

If you want more information about the clip, for example, to see what kind of clip it is, or to give it a title or description, right-click the Clipbook key and choose Properties.

SETTING UP THE CLIPBOOK

You can create a variety of custom Clipboards, and associate one of them as the default Clipboard when using the Clipbook. To create a new Clipboard and to set up a different default Clipboard, follow these steps:

1. From the Clipbook dialog box, choose Clipboard, Manage; or right-click the Clipbook icon in the System Tray and choose Manage. The Clipbook displays the Manage Clipboards dialog box, shown in Figure 13.8.

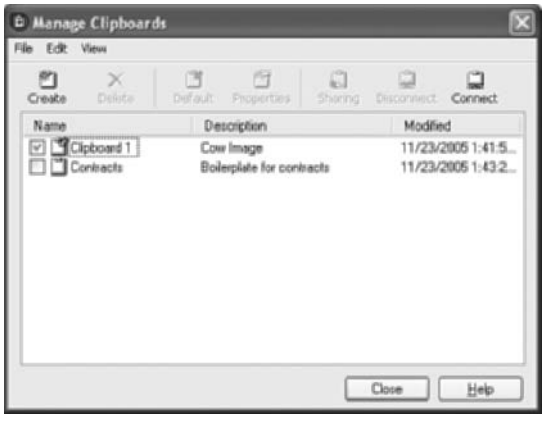


Figure 13.8
You can set up several Clipboards in the Clipbook, and you can choose any of them as the default Clipboard for transferring your cut or copied items.

2. Click the Create button to create a new Clipboard, and provide a name for it, along with an optional description.
3. Click the name of a Clipboard to select it. If it's already the default Clipboard, the Default button on the toolbar is grayed out. If it's not the Default Clipboard, and you want it to be, click the Default button on the toolbar.
4. If you want to display a Clipboard in the Clipbook, check the check box to the left of the Clipboard and a green arrow appears to indicate that it will be displayed. You can display more than one Clipboard at a time in the Clipbook.
5. Click Close to return to the Clipbook. The Clipbook now displays your selected Clipboards, along with a list of keys (0–9, A–Z) for each to which you can assign clips that you copy or cut (refer to Figure 13.7).

NOTE

Because the Clipbook is actually a file, you can also set up the Clipbook on a network drive, and you can share Clipbook contents with other users.

Choosing Clipbook Options

The Clipbook operates with several default options that might not fit the way you work. You can change many of these options by opening the Clipbook (double-click the icon in the System Tray), and choosing File, Settings. Here you can change a Popup window style or location, Clipbook location, and whether to launch the Clipbook each time you start Windows. You can also change default keystrokes for cut, copy, and paste, and even specify different shortcuts for different applications.

Using OLE Linking and Embedding Options

OLE means object linking and embedding. When you paste information from another program, WordPerfect can embed the information, and Windows can remember where the information came from. When it comes time to edit the embedded information, simply double-click it. Windows opens an editing window within WordPerfect, and switches you to the source program so that you can edit in the original program, using that program's menus, keystrokes, and other procedures. When you finish, you return to WordPerfect with the updated information by clicking in the WordPerfect document.

TIP FROM

Read Gilgen

If you use normal methods of copying and pasting information, WordPerfect inserts only the information you're copying and does not create an OLE link back to the original program. However, you can choose Edit, Paste Special and choose the format associated with the original program to paste the information and to establish the OLE link.

TIP FROM

Read Gilgen

If you drag and drop the information from the other program to WordPerfect, WordPerfect automatically establishes an OLE link. The procedure is similar to dragging and dropping text between WordPerfect documents: Find the target in WordPerfect, and then go to the source program and drag the selected information to the WordPerfect button on the Windows taskbar. When WordPerfect appears, drop the information in the WordPerfect document.

You can also create new OLE objects within WordPerfect. For example, you can create a Word document or even a PowerPoint slide inside a WordPerfect document. This is also the same process used when you create a drawing in WordPerfect, since in reality you use Corel's Presentations program to create an OLE object. To create an OLE object that you embed in a WordPerfect document, follow these steps:

1. Choose Insert, Object to display the Insert Object dialog box (see Figure 13.9).

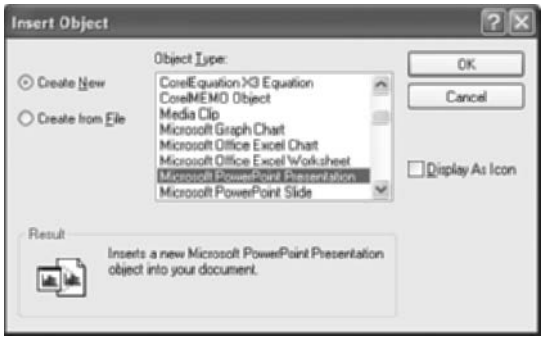


Figure 13.9
You can use the Insert Object dialog box to insert OLE objects.

2. Select the object type from the list of options. Only the OLE-capable programs (called OLE servers) that are installed on your system appear on the list.
3. Click OK. The OLE server application starts and takes control of WordPerfect's menus and toolbars. It also opens an editing window in which you can use all the application's procedures to create the object (see Figure 13.10). This is called in-place editing.

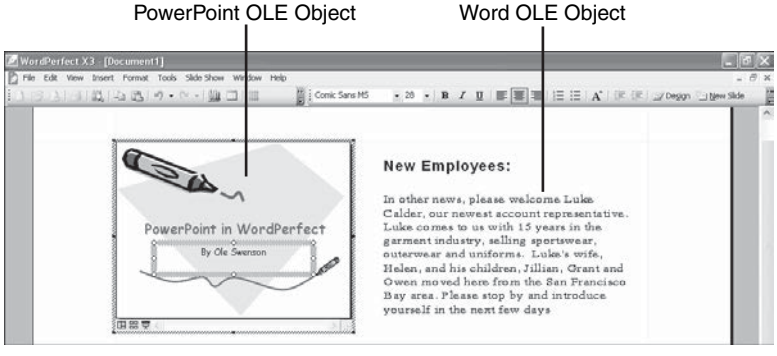


Figure 13.10
You can create or edit, in place, OLE objects such as PowerPoint slides or Word documents.

4. Close the OLE editing window by clicking outside the in-place editing window. WordPerfect takes control of menus and toolbars again.

NOTE

> Some OLE server applications do not support in-place editing. Instead, they open a completely separate application window where you create or edit the object. You then exit the application to return to WordPerfect.

You can also embed or create a link to an existing OLE object created by another application. To create an OLE link, follow these steps:

1. Choose Insert, Object to open the Insert Object dialog box.
2. Click Create from File.
3. Browse to find the file you want to insert.
4. By default, WordPerfect inserts the file as an embedded object. However, if you choose Link, WordPerfect inserts the object and also creates a link to the original file so that changes made to that file are reflected in the WordPerfect document.
5. Click OK to insert the object in your document.

TIP FROM

Read Gilgen

> Don't forget that many applications enable you to drag and drop objects from their programs into WordPerfect.

Extremely large WordPerfect documents are unwieldy and take up a lot of disk space. If you're having trouble with such documents, it might have to do with OLE. See "Keeping Files Small" in the Troubleshooting section at the end of this chapter.

WORKING WITH WORD AND OTHER WORD PROCESSING DOCUMENTS

Let's face it. WordPerfect might be the best word processing program in town, but marketing muscle has helped Microsoft lay claim to a large portion of the Windows word processing turf. If you're lucky, your organization has standardized on WordPerfect alone. But more likely, you're faced with having to work on documents created initially in other word processing programs.

Fortunately, WordPerfect has kept pace with the need for interchangeability with other programs. In fact, Corel has placed a great deal of emphasis on providing up-to-date and accurate document conversions in each succeeding version of WordPerfect. Whether your other word processing program is WordPerfect 5.1 for DOS or Word 2003, you'll find it easier than ever to use WordPerfect to work with these documents.

OPENING AND CONVERTING FILES FROM OTHER WORD PROCESSING PROGRAMS

The first step in working with a document from another word processing format is to open it in WordPerfect. Access the File Open dialog box, find the file, and click Open. WordPerfect briefly displays the conversion information box, and then opens the document in WordPerfect.

By default, WordPerfect installs all of its conversion filters, and thus you can be assured that if WordPerfect can convert a file, it will. WordPerfect supports and converts a number of common modern formats, from Ami Pro or ASCII to XyWrite or XML, and many other formats in between.

OPENING AND CONVERTING PDF DOCUMENTS

If you've ever tried to copy text from a PDF document and paste it into WordPerfect, you know that doing so manually is cumbersome. Furthermore, you often encounter difficulties in preserving text flow and in importing graphic images from the PDF document. With WordPerfect Office X3, Corel has introduced the capability to open PDF documents directly into WordPerfect, thus making it easier and cleaner to reuse PDF documents. This is no small feat, and although some resulting conversions are better than others, this feature allows you to turn PDF document content into editable WordPerfect content.

To convert a PDF document into WordPerfect, simply open the PDF document. WordPerfect displays the PDF Import dialog box (see Figure 13.11). Click OK to complete the conversion, or click the Learn More button to find out more about this exciting new feature.

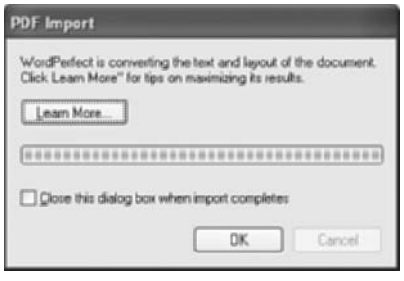


Figure 13.11
WordPerfect can now import PDF documents by simply opening them in WordPerfect.

As you work with imported PDF documents, consider the following:

- Documents originally created in WordPerfect and published to PDF convert back to WordPerfect perfectly.
- Documents published to PDF using Adobe Acrobat or any other program that uses a design layout convert relatively cleanly. However, WordPerfect has to do the best job it can in interpreting the original layout intent. In some cases you'll have to rework the layout, especially with heavily formatted documents, such as newsletters in columns.

- Documents scanned as images and published to PDF cannot be converted to a WordPerfect text. However, the image is inserted as an image in a WordPerfect document. If you need text, you must use OCR scanning software such as ScanSoft to convert the image to text.
- Images imported from PDF files retain their original format, bitmap or vector, making it easy to manipulate and reuse graphic images.
- WordPerfect adheres to locking and security measures used in PDF documents, such as passwords that may be required to open them.

NOTE

> PDF documents created with Adobe Acrobat may prompt you for a password, even if they were not saved with a password. In most cases, such documents open without a password.

USING DATA FROM UNSUPPORTED FORMATS

Despite WordPerfect's extensive support for automatic file conversions, you're bound to discover a document sometime that can't be opened in WordPerfect. When you try to open such a file, WordPerfect displays the Convert File Format dialog box (see Figure 13.12), and the Convert File Format From box shows Unsupported Format. There are a few methods for dealing with this problem:

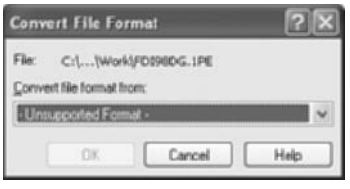


Figure 13.12
If WordPerfect can't convert a file, it displays the Convert File Format dialog box, where you can choose an alternative conversion format.

- If you know the source of the document (for example, WordPerfect 4.2), make sure you have installed the necessary conversion filters. If you think you know what program created the file, but aren't sure what version, try various options to see whether you can open the file.
- If you have the original program used to create the file, open the document in the other program and see whether you can save it to an intermediate format, such as RTF, that WordPerfect understands. You might lose some formatting in the translation, but you'll retain the content of the document.
- When all else fails, you can usually open the file as an ASCII file. Try the CR/LF to SRt option first because it converts the hard returns at the end of ASCII lines to soft returns, thus preserving text paragraphs.

CAUTION

Always use the ASCII import as a last resort because you lose all document formatting with this option. ASCII imports also usually require extensive editing to clean up the resulting conversion.

TIP FROM

Read Gilgen

Although you can easily convert non-WordPerfect files one by one on-the-fly, you can also convert entire groups of files, and store the converted results in a folder you specify, by accessing the external WordPerfect Conversion Utility (for example, Windows Start, All Programs, WordPerfect Office X3, Utilities, Conversion Utility).

Because it's easy to convert files only as you need them, you rarely need to use this mass conversion utility. But if you do, it's nice to know it's there.

EDITING A CONVERTED DOCUMENT

Although WordPerfect does a great job of converting a wide variety of document formats, inevitably you'll find that certain things don't convert cleanly.

The first reason is that WordPerfect tries to maintain the exact format of the original document. Because other word processing programs use different default layouts, this often causes WordPerfect to add margin, font, or style codes to the converted document that you wouldn't find in a typical WordPerfect document. For example, Figure 13.13 shows the Reveal Codes screen from a converted Word document, along with its opening styles in the Styles Editor dialog box.

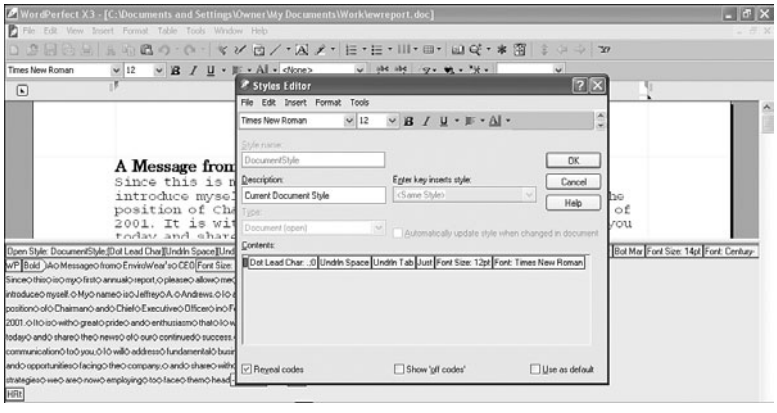


Figure 13.13
You can use Reveal Codes to determine what codes, such as margins, tab sets, or styles, must be changed or deleted from an imported document.

The second reason is that WordPerfect doesn't always know how to handle certain formatting. When WordPerfect guesses, it sometimes guesses wrong.

The resulting converted WordPerfect document must be cleaned up to become a truly useable document. The following are some strategies you can use to complete the conversion process:

- Open Reveal Codes and see what kinds of codes you have to deal with. It might be that you can simply delete a few codes and be back to a standard WordPerfect layout.

TIP FROM

Read Gilgen

> Don't forget that you can delete codes by using the mouse to click and drag codes out of the Reveal Codes window.

- In Reveal Codes, double-click the initial Open Style: Document Style button to display the document default codes (refer to Figure 13.13). Only codes that differ from WordPerfect's default codes appear in this dialog box. Remove any codes that shouldn't be there.
- Use the Spell Checker, which often finds legitimate words combined with special characters.
- Use Find and Replace to match codes or characters and to replace them with the appropriate codes or with nothing. For example, you might replace the typical Word margin setting of 1.25 inches with nothing, which returns the document to the default 1-inch WordPerfect margin. Although using Find and Replace can be a bit tedious, after you're familiar with what you need to replace, this can save you a lot of time.
- Use macros if you have a lot of documents to clean up. You can use macros to set up, find, and replace various codes so you don't have to do these things manually.

➔ To learn more about Find and Replace, **see** "Searching for Text by Using Find and Replace," **p. 126**.
➔ To learn how to use macros, **see** "Using Macros to Automate Repetitive Tasks" in Chapter 21, "Using Experts and Macros."

Saving and Exporting to Other Word Processing Programs

So, you're the only maverick in the office. They tell you you'll have to switch to Word someday, but you insist on keeping your trusted WordPerfect. Fortunately, you can also exchange documents with your co-workers, even if they don't use WordPerfect. You already know how to open and edit their documents. To send your documents to them in a format they can use, you simply use Save As to save the document. To save a document in a different format, follow these steps:

1. Choose File, Save As. WordPerfect displays the Save As dialog box.

TIP FROM

Read Gilgen

> If you display the Compatibility toolbar (View, Toolbars), you can convert documents with the click of a button to Word, PDF, HTML, or XML formats. You can also open the Conversion Utility from this toolbar.

2. Type the name of the file you want to use, unless you intend to use the same name.
3. Click the File Type drop-down menu and select the file format you want to convert to (for example, MS Word 97/2000/2002/2003 for Windows). In most cases, WordPerfect adds the appropriate filename extension (for example, .doc).
4. Click Save. WordPerfect converts the document into the selected format.

If you continue to work on the document and save it again, WordPerfect prompts you with the Save Format dialog box (see Figure 13.14). Unless you want to change back to the WordPerfect format, click the conversion format (for example, MS Word 97 for Windows) and click OK.

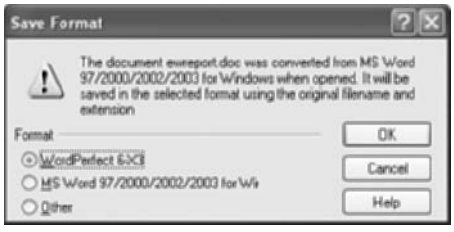


Figure 13.14
When you save a document whose original format is other than the current version of WordPerfect, WordPerfect asks which format you want to save it to.

NOTE

When you convert and open a document from another format, you get the same Save Format dialog box the first time you save it. If you intend to keep the document in WordPerfect format, click OK, and WordPerfect does not prompt you again.

CONVERTING TO PDF

Perhaps the most common non–word processing format used today is Adobe's PDF, or Portable Document Format. This format enables you to create documents that exactly match the original in terms of layout, fonts, and special effects. Readers can view these documents with the free Adobe Acrobat Reader, and thus they are not required to have WordPerfect installed on their system.

NOTE

Adobe Acrobat Reader is a free reader that understands PDF-formatted documents. Many Web sites routinely publish documents in PDF format, and many users already have installed Acrobat Reader. They might see it only as an automatic plug-in to their Web browser, but they can also start the program from the Start, All Programs menu. Also, just double-clicking a PDF document in the Windows Explorer automatically starts Acrobat Reader and views the PDF document.

Nearly anything you create in a WordPerfect document is faithfully reproduced in a PDF document. However, if you're converting a fairly long document to PDF, consider the following:

- Use heading styles, and create bookmarks throughout your document to provide a list of bookmarks for Adobe's Acrobat Reader.
- Create a Table of Contents using hyperlinks to section headings. These will appear as clickable links in the PDF document.
- Create other hyperlinks to aid readers as they navigate the PDF document.

To convert a WordPerfect document to PDF format, follow these steps:

1. Save the document one last time in WordPerfect format. You might need to come back to the original version later.
2. Choose File, Publish to PDF. WordPerfect displays the Publish to PDF dialog box (see Figure 13.15).

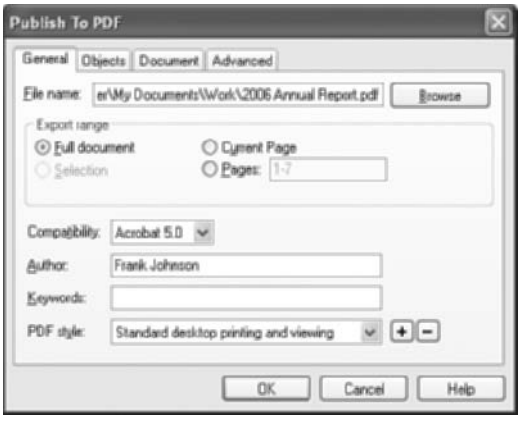


Figure 13.15
Use the Publish to PDF dialog box to create documents that anyone can read using the Adobe Acrobat Reader.

3. Specify the name of the PDF file in the File Name Edit box. Typically, this is the name of the WordPerfect file, with a .pdf filename extension.
4. Click OK to publish the file to the PDF format.

The Publish to PDF dialog box offers a wide variety of options, primarily designed to help you fine-tune the PDF document for its intended use. For example, you can choose from three predefined settings (standard, highest quality, smallest file), which further change other settings in the PDF dialog box. A typical 30K WordPerfect file thus converted results in file sizes from 28K to 180K.

WordPerfect publishes PDF documents so quickly that it's easy to think nothing has happened. You can verify the PDF format by starting Adobe Acrobat Reader and opening the PDF file you just created (see Figure 13.16).

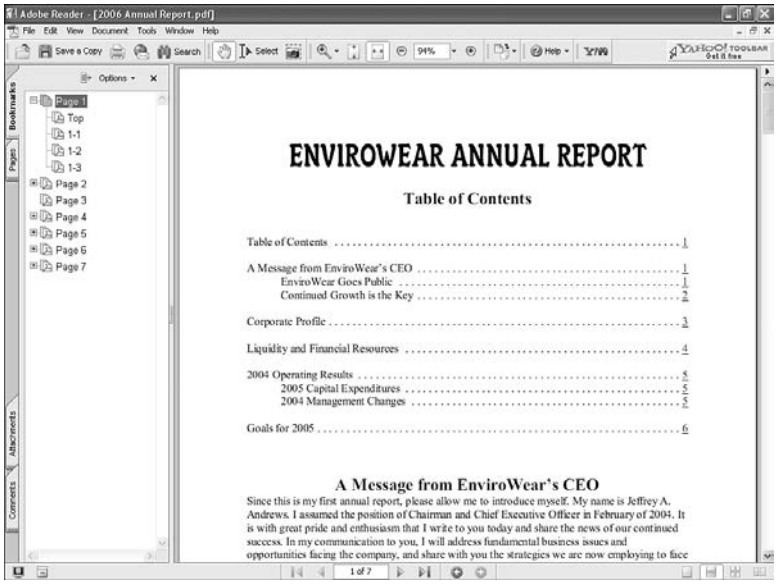


Figure 13.16
The Adobe Acrobat Reader enables anyone, even non-WordPerfect users, to see your documents exactly as you intend them to appear. Readers can easily zoom in or out, print, or even use hyperlinks or bookmarks if you include them.

CAUTION

> Although WordPerfect's implementation of the Adobe Acrobat standards is very good at converting your WordPerfect documents to PDF format, not everything converts perfectly. For example, some spacing between characters may not be perfect. Before you distribute the PDF version of your documents, you should check it both onscreen and by printing a page or two to make sure you can live with these minor problems.

In addition to the three default PDF styles, you can also choose various options to make your PDF document better meet your needs. Among the options found on the other three tabs of the Publish to PDF dialog box are the capability to embed fonts (assuming you use fonts that readers might not have installed), and compression, color, and display options.

You probably won't need to worry about these options because the standard PDF style combinations generally provide very satisfactory results.

Finally, WordPerfect Office X3 has added the capability to import PDF files into WordPerfect, as described earlier in this chapter.

IMPORTING AND USING DATABASE DATA

Data conversion typically centers on word processing information. But you can also convert and use data from other sources, such as databases and spreadsheets.

CONVERTING TO WORDPERFECT FORMATS

WordPerfect's database format is the merge data file. Each record is separated by an end of record code, and each field is separated by an end of field code (see Figure 13.17). This

structure is typical for any flat-file database—that is, individual records are divided into common fields.

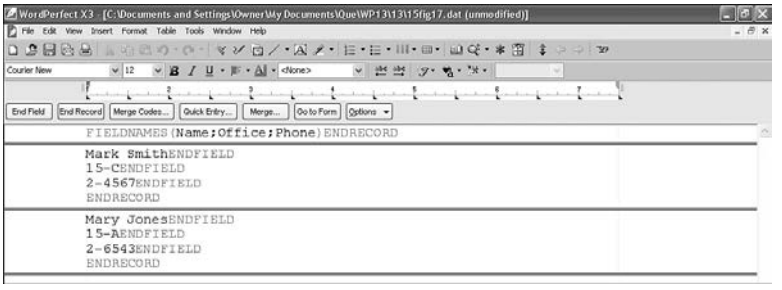


Figure 13.17
Merge data files separate records and fields with merge codes.

Any database that uses a similar structure can be converted into a WordPerfect data file.

NOTE

> Relational databases do not convert well to a typical merge data file format because they are too complex. Records with one set of fields relate to other records with a different set of fields. Each set of records, typically, is its own database. Because only information that can be extracted in a flat format (one type of record and set of fields) can be imported into a WordPerfect merge data file, you must import separately each table of a relational database.

To import a database into a WordPerfect format, follow these steps:

1. Choose Insert, Spreadsheet/Database, Import. WordPerfect displays the Import Data dialog box (see Figure 13.18).

Figure 13.18
The Import Data dialog box enables you to import many database and spreadsheet formats.

2. From the Data Type drop-down menu, select the format of the database you want to import. Database formats supported by WordPerfect include Clipper, dBase, FoxPro, Paradox, ODBC (including Microsoft's Access and SQL), and ASCII-delimited text.

NOTE

> Nearly any database program can create database files of ASCII-delimited text. ASCII is plain text, and delimiters separate the records and fields of such text. Typical delimiters include commas, spaces, quotation marks, and so on.

TIP FROM

> If you convert a lot of the same type of ASCII-delimited files, you can select Tools, Settings and use the Convert tab of the Convert Settings dialog box to set the ASCII delimiters you use most often.

3. From the Import As drop-down menu, select the target format in WordPerfect. Options include the following:
   - **Table**—Each row is a database record, and each column is a field in a record.
   - **Text**—Each line is a database record, and each field in the line is separated by a tab.
   - **Merge Data File**—Records and fields import with merge codes (refer to Figure 13.17). This can be particularly useful if you want to manage or reuse the data—for example, in merge letters.

➔ For more information on using merge data files, **see** "Merging a Form Document with a Data File" in Chapter 19, "Assembling Documents with Merge."

4. Browse to find a database filename of the same type as the data you selected.
5. The bottom portion of the screen changes depending on the type of database you import (see Figure 13.19). The ASCII-delimited type, for example, asks you to specify just what the delimiters are. The example shows that fields are separated by commas, and records are separated by a combination line feed and carriage return. Change the delimiters, if necessary, to match those used in the database. Click the Delimiters or Characters drop-down menu to select non-keyboard delimiters such as Tabs or Carriage Returns. Other databases enable you to choose which fields to import for each record. This can be particularly useful if the number of database fields is large.
6. Click OK to import the database into your WordPerfect document.

TIP FROM

> With many database types, you can open the database directly through the Open File dialog box. When you do, WordPerfect recognizes the database format and automatically displays the Import Data dialog box with all the appropriate information already filled in.

Figure 13.19
In the Import Data dialog box, you can specify the delimiters to be used when importing an ASCII-delimited database.

If you import a database from a program such as Paradox, after clicking OK you might also see one or more of the options in the Import Data dialog box, shown in Figure 13.20.

Figure 13.20
In the Import Data dialog box, import options are available when importing more complex data such as a database from Paradox.

The options include

- **Query**—You can set criteria before importing data so that you get only the data you need (see Figure 13.21). For example, if you want only the records for customers from the United States, you could query the database and have it extract and import only those Country records that equal U.S.A.

TIP FROM

Read Gilgen

If you're not sure how to use the query criteria, click Example for hints and examples.

Figure 13.21
When importing a database, you can use the Define Selection Conditions dialog box to extract and import records that meet criteria you set.

- **Fields**—If the database contains a large number of fields, you might want to limit the number of fields that you import into the WordPerfect document. Select the ones you want to import, and deselect the ones you want to exclude.
- **Table**—If the file has multiple record types, each must be imported separately. Choose the record set you want from the Table list. The Paradox database being imported in Figure 13.20 does not contain multiple record types, and therefore the Import Data dialog box does not show a Table list.

LINKING DATABASE DATA

WordPerfect also enables you to link an imported database so that changes to the original database can be updated in WordPerfect. To link a database to a WordPerfect document, follow the same steps as for importing a database, but choose Insert, Spreadsheet/Database, Create Link, instead. You can also update the links you create by choosing Insert, Spreadsheet/Database, Edit Link.

SORTING DATABASE DATA IN TABLES

Sorting database information in WordPerfect tables is easy and practical. To sort table information, follow these steps:

1. Position the insertion point anywhere in the table.
2. Choose Tools, Sort, or press Alt+F9. WordPerfect displays the Sort dialog box (see Figure 13.22).

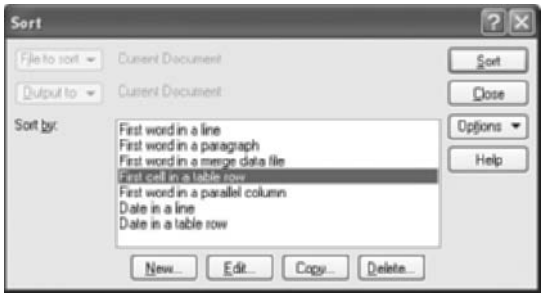


Figure 13.22
You can use the Sort feature to sort data in tables.

NOTE

> WordPerfect enables you to sort information from a variety of formats, including tables, merge files, lines, and paragraphs. The procedures described here apply generally to other sorting as well.

3. Choose the type of sort you want. By default, the first time you sort a table, WordPerfect assumes that you want to sort by the first word in the first cell of each table row.
4. Click Sort to perform the sort.

CAUTION

> By default, WordPerfect does not allow you to Undo a sort. Before sorting, you may want to choose Options, Allow Undo After Sorting. Once chosen, this setting remains in effect, and you can quickly Undo a sort if you don't like the results.

NOTE

> Imported database tables already have header rows that do not get sorted with the rest of the data. In tables you create, you must use the Row tab of the Table Format dialog box to specify header rows before sorting. Otherwise, the header rows get sorted along with everything else.

If sorting by the first word of the first cell isn't what you had in mind, you can select a definition from the Sort By list and click Edit. You can also click New to create a new definition.

NOTE

> It's usually best to leave original default sort definitions alone and to create new ones if you need different sort criteria. That way, you always have at least one unchanged example if you need to refer to it.

To create a new sort definition, follow these steps:

1. Access the Sort dialog box (refer to Figure 13.22).
2. Click New. WordPerfect displays the New Sort dialog box (see Figure 13.23).
3. Edit the sort description (for example, USA Customer List Sorted by Phone Number).
4. Make sure Table Row is selected.
5. Edit the sorting rules using these options:
   - **Key**—The first sorting rule is also the first key. You can choose Add Key at End of the rules, Insert Key Between other rules, or Delete Key if there are two or more in the list.

Figure 13.23
You can use the New Sort dialog box to set up a new sort definition.

- **Type**—You can choose Alpha or Numeric from the drop-down list. Alpha sorts in alphabetic order, and Numeric sorts by numeric value. In an Alpha sort, for example, 11 comes before 2.
- **Sort Order**—Choose Ascending (A–Z) or Descending (Z–A) from the drop-down list.
- **Column**—Specify the column of data to sort on.
- **Line**—Specify which line to sort on, if there is more than one line of text in the cells (for example, a multiline address).
- **Word**—Specify which word to sort on. 1 means the first word, 2 the second word, and so on. To count from the end of the line, specify –1 for the last word, –2 for the next-to-the-last word, and so on.

TIP FROM

Read Gilgen

When sorting by last name, specify –1. If you specify 2, you sort on the second name, even for people who have three names (for example, Cynthia Lynn Lacayo sorts by Lynn).

- **Extract Records**—You can discard records that you don't want and sort the remaining records. Simply set up one key and specify what it should contain (for example, key1=U.S.A.).

6. Click OK to return to the Sort dialog box.

Setting up sort criteria takes some getting used to. Remember that the second key applies only after the first key has finished sorting. For example, you might make the first key sort by ZIP Code to group everyone by ZIP Code, and then make the second key sort by last name to alphabetize each ZIP Code group. See Figure 13.24, which shows the setup for

sorting a customer list by phone number and extracts only records that contain U.S.A. in the second column.

Figure 13.24
The New Sort dialog box shows criteria for sorting a U.S.A.-only customer phone list.

Finally, click Sort and see what happens. You will likely have the opportunity to use Undo and try it again.

TIP FROM

Read Gilgen

If you want to be able to undo a sort that doesn't work as you expected it to, choose Allow Undo from the Options in the Merge dialog box.

Using Database Data with Merge

Importing database information to a WordPerfect merge data file is faster and easier than typing all the data over again, but wouldn't it be even nicer if you could merge directly from the database file itself so you don't have two separate databases?

You can! To merge directly from a database file, follow these steps:

1. Create a merge form file.

➔ For information on creating merge documents, **see** "Creating Form Files," **p. 515**.

2. Access the Merge dialog box (by selecting Tools, Merge, by pressing Shift+F9, or by clicking the Merge button on the Merge toolbar). WordPerfect displays the Merge dialog box (see Figure 13.25).

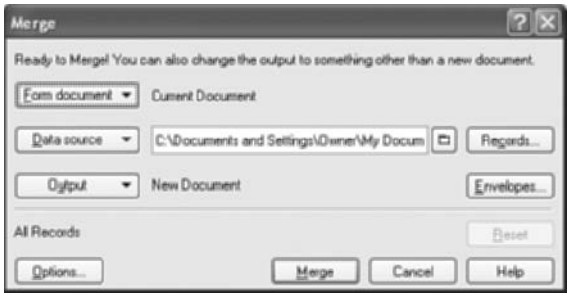


Figure 13.25
In the Merge dialog box, you can specify a database file in place of a standard merge data file.

3. Choose the type of database source file you'll use by clicking the Data Source drop-down menu, which includes the following options:
   - File on Disk, for Paradox and WordPerfect merge data files
   - Address Book, for address book files found on your computer
   - ODBC, for Access, dBASE, or FoxPro files
4. Choose the options you want, such as Select Records to query the database, or Envelopes if you want to merge address information to envelopes along with the merge document.
5. Click Merge to perform the merge. WordPerfect merges the data directly from your database file with the Merge Form document.

IMPORTING AND EXPORTING A DATABASE TO AND FROM TABLES

The Table Convert feature enables you to change ASCII-delimited text to table format, or to change table data into database or merge formats.

Suppose someone sends you a comma-delimited database file as a plain-text file. You can, of course, use the methods described earlier in this section to import the database file into a table. However, an easier method is to simply open the file and then convert it to a table. To convert onscreen data to a table, follow these steps:

1. Select all the data (that is, all the records of the database).
2. Choose Table, Convert. WordPerfect displays the Convert: Text to Table dialog box (see Figure 13.26).
3. Choose the type of data being converted—that is, the type of delimiters being used to separate the fields of each record of the database. WordPerfect makes a guess (usually the correct one), but you can change that by choosing from among Commas, Tabs, Paragraphs, Merge Data file, Parallel Columns, or a delimiter of your own choosing.
4. Choose any other options you want, including the number of columns, column format, or table format using SpeedFormat.
5. Click OK to convert the text to a table.

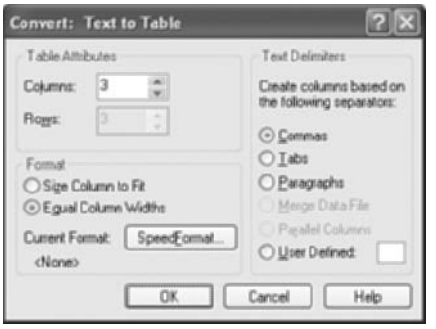


Figure 13.26
The Convert: Text to Table dialog box helps you quickly convert a variety of data formats to a table.

Another handy use for this feature is to convert table data into delimited database format, or into a list or a merge file. For example, you might simply want a sequential list of addresses, without having to first create a merge form to extract the data from the table. Or, you might want to convert the table to a merge data file because you find that using a table isn't practical because you have too many fields.

To convert table data to a database or other format, follow these steps:

1. Position the insertion point anywhere in the table.
2. Choose Table, Convert. WordPerfect displays the Convert: Table to Text dialog box (see Figure 13.27).

Figure 13.27
The Convert: Table to Text dialog box helps you easily convert WordPerfect table data to other data formats.

3. Choose the format to which the data will be converted.

NOTE

When you convert data from a table to a text format, each field is separated by the delimiter you select, and each record is separated by an HRt code. The exception is the Paragraph format, where fields and records alike are separated by an HRt code.

CAUTION

> You cannot convert the results of a Paragraph conversion back to a table. You can use Undo, but if you plan to reuse the data in a table format, you should save the converted table with a different filename.

4. Click OK to convert the table data.

TIP FROM

Read Gilgen

> If you want to create an address list from your table, and want each address to be separated by a blank line, insert a column after the last column of your table before converting it to paragraph format.

IMPORTING AND USING SPREADSHEET DATA

Another important type of data that you might need in a WordPerfect document comes from spreadsheets. Because spreadsheets are typically arranged in rows and columns, what better way to present spreadsheet data than in a WordPerfect table?

CONVERTING SPREADSHEET DATA

WordPerfect can convert data from nearly any modern spreadsheet program, including Quattro Pro and Excel. To import a spreadsheet into WordPerfect, follow these steps:

1. Choose Insert, Spreadsheet/Database, Import.

TIP FROM

Read Gilgen

> If you simply open a spreadsheet, WordPerfect opens the Import Data dialog box and fills in most of the spreadsheet information for you.

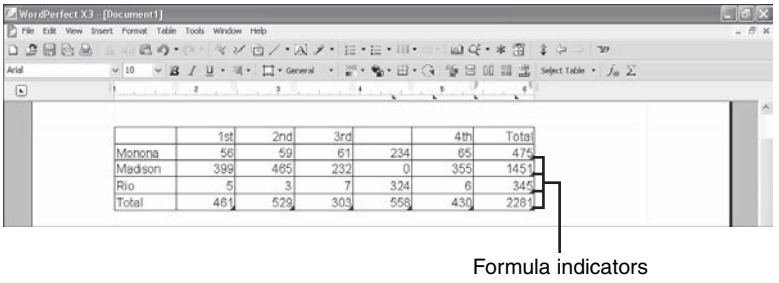
2. From the Data Type drop-down menu, select Spreadsheet.
3. From the Import As drop-down menu, select the target format in WordPerfect. Options are the same as for databases, WordPerfect tables, plain tab-delimited text, and WordPerfect merge data files. Table is the default format.
4. Browse to find the filename of the spreadsheet you want to import.
5. Click in the Named Ranges box, or press Tab. WordPerfect displays any named ranges it finds in the spreadsheet, and shows the upper-left and lower-right cells of the range (for example, A1…F8).

TIP FROM

Read Gilgen

> Because spreadsheets can be much larger than a typical word processing page, it helps to create named ranges in the spreadsheet program to make it easier to extract only portions of a spreadsheet in WordPerfect.

6. If there are no named ranges, or you want to specify a different range, in the Range box type the upper-left and lower-right cells of the area of the spreadsheet you want to import.
7. Click OK to insert the selected portion of the spreadsheet in a WordPerfect table (see Figure 13.28).



	1st	2nd	3rd		4th	Total
Monona	56	59	61	234	65	475
Madison	399	465	232	0	355	1451
Rio	5	3	7	324	6	345
Total	461	529	303	558	430	2281

Figure 13.28
An imported spreadsheet looks like any other WordPerfect table, except that it can also include table formulas, marked by a triangle in the lower-right corner of the cell.

LINKING SPREADSHEET DATA

You can also link spreadsheet data to a WordPerfect table the same way you link database data (see the section "Linking Database Data," earlier in this chapter). The functions and options for each are identical.

USING SPREADSHEET FORMULAS IN TABLES

One huge difference between typical tables and tables that contain imported spreadsheets is that the latter also include formulas, and such tables function just like spreadsheets. In fact, even WordPerfect tables you create can also be made to function like spreadsheets by using formulas.

To work with formulas in WordPerfect tables, use the following options:

- **The Formula toolbar**—Position the insertion point in the table and choose Table, Formula Toolbar. Alternatively, you can right-click the table and choose Formula Toolbar from the QuickMenu. WordPerfect displays a formula bar and buttons to assist in working with table numeric data (see Figure 13.29, which also shows a formula in the Formula text box because the insertion point is in cell F5, which contains a formula).

TIP FROM

Read Gilgen

> Double-click a blue formula indicator in a table cell to display the Formula toolbar along with the formula for that cell.

- **Row/column indicators**—If the Formula toolbar is already displayed, click the Turn Row/Column Indicators On or Off button, or choose Table, Row/Col Indicators. WordPerfect displays spreadsheet-like row and column indicators (refer to Figure 13.29).

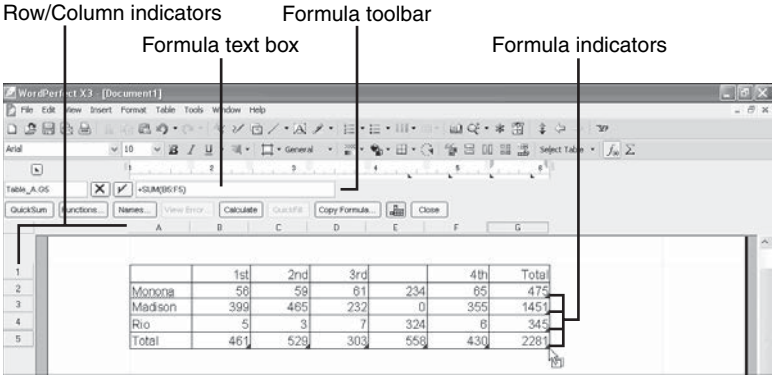


Figure 13.29
A table can contain formulas that function like those in a spreadsheet.

Working with formulas in WordPerfect tables is perhaps even easier than working with a spreadsheet program. Consider the price list table in Figure 13.30, which illustrates some of the following options you have in creating and working with table formulas:

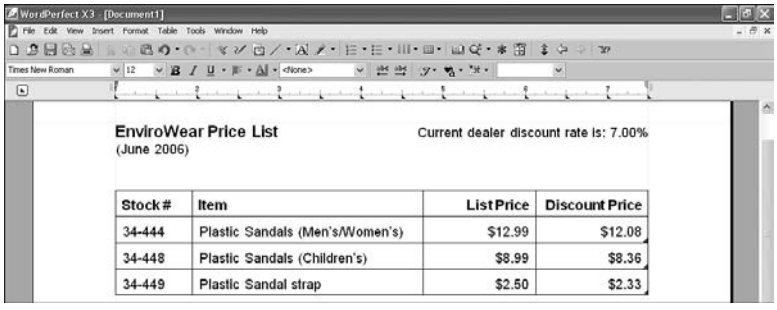


Figure 13.30
This price list uses table formulas to calculate discount prices.

- **The Formula text box**—Here, you can type formulas. For example, to show a 7% discount price, in cell D2 you enter `C2-(C2*.07)`.

CAUTION

> Be sure your insertion point is in the cell where you want the formula before you click the Formula text box. Otherwise, you'll enter a formula where you didn't expect to.

- **Accept Formula**—Enters the formula into the table cell. You can also press Enter.

- **Cancel Formula**—Cancels the formula you might have been building. You can also press Esc.
- **QuickSum**—Click this button to quickly add all contiguous numeric cells above the cell that contains the insertion point. If the first cell above that point is blank, QuickSum adds contiguous cells to the left.

If you're having trouble making a column of text add properly, see "Ignoring Values in Text Cells" in the Troubleshooting section at the end of this chapter.

- **Functions**—You can choose from a complete array of spreadsheet functions from the Table Functions dialog box (see Figure 13.31). Click a function to display a brief description of what it does and how to use it.

Figure 13.31
WordPerfect enables you to use a complete set of spreadsheet formula functions, such as the one used to calculate a periodic payment.

- **Names**—You can name cells and ranges of cells, and use those names in table formulas. You can even link the values of named cells in one table to formulas in other tables, or in floating cells.
- **View Error**—If you get an error message (if you build a formula incorrectly, for example), click this button to find out why you got the error and how to fix the problem.
- **Calculate**—You can force the table to recalculate. By default, tables automatically calculate when you make changes. If you have turned off this default (Table, Calculate), you'll need to recalculate your table after making any changes. Also, it's a good idea to recalculate everything one last time before printing.
- **QuickFill**—This option enables you to begin a series of numbers in a row or column, and then select the entire column and fill in the rest of the cells automatically.
- **Copy Formula**—The Copy Formula dialog box (see Figure 13.32) enables you to copy a formula to a specific cell, up or down, or to the left or right *n* number of cells.

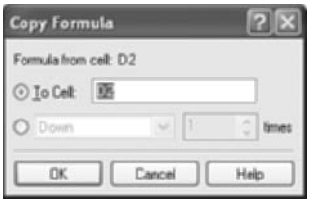


Figure 13.32
You can use the Copy Formula dialog box to copy formulas to other parts of a table, just as you do in a spreadsheet.

TIP FROM

Read Gilgen

You can copy a formula by dragging its formula indicator to another cell.

CAUTION

When you copy a formula to another cell, the formula's cell references change to reflect their relative location. For example, if you copy the formula to add a column of numbers to a different column, the formula changes to add the numbers in the target column, not in the column from which it was copied. Although this is generally what you want to happen, be aware that you might have to check your copied formulas to make sure they are calculating what you expect them to calculate.

You can also use the row/column indicators to select entire rows or columns by simply clicking the row or column indicator. You can use drag and drop to move the selected row or column.

You can also access the Table menu or the QuickMenu and choose Format to change column alignments and other features. Choose Numeric Format from the same menus to apply formats such as currency and percentages (see Figure 13.33).

Figure 13.33
You can use the Properties for Table Numeric Format dialog box to set formatting for numbers, such as currency, percentage, and so on.

USING FLOATING CELLS

Floating cells are another way of working with spreadsheet data, but in a somewhat unusual way. Floating cells are invisible cells that display their content as if they are part of the text that surrounds them. In Figure 13.34, for example, the discount percentage displayed in the floating cell is also referenced in the formulas in Column D that show the discounted price. If you change the value in the floating cell, the discounted price amounts also change.

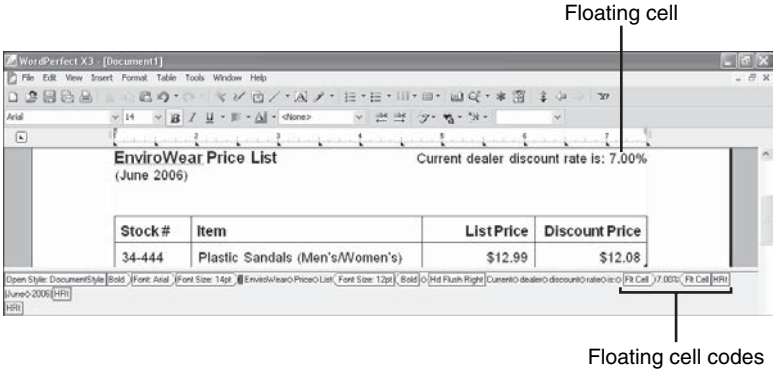


Figure 13.34
A floating cell looks like other text, but the data is contained between two floating cell codes, shown here in Reveal Codes.

To create a floating cell, its formula, and numeric format, follow these steps:

1. Position the insertion point where you want the floating cell.
2. Choose Table, Create, or press F12. WordPerfect displays the Create Table dialog box (see Figure 13.35).

Figure 13.35
You can use the Create Table dialog box to create a floating cell.

3. Choose Floating Cell and click Create. WordPerfect inserts a pair of floating cell codes in your document and turns on the Formula toolbar (refer to Figure 13.34).
4. Click the Formula text box and then create the formula for the floating cell. Click the Accept Formula button to place the formula in the floating cell.

TIP FROM

Read Gilgen

> You can point to table cells or other floating cells to build formulas in the Formula text box.

5. Click on the displayed text of the floating cell; then choose Table, Numeric Format, and select a numeric format for the floating cell (for example, Percent, to two decimal places).

That's it! As you make changes to the table or other floating cells, the results automatically recalculate. If you want to be sure, you can right-click any of these and choose Calculate from the QuickMenu.

TIP FROM

Read Gilgen

One particularly good use for floating cells is a mortgage loan letter. If you've ever seen a form letter from the bank telling you what your mortgage rate will be, you know they don't sit down and type each of the loan figures in by hand. Indeed, you can create similar documents by using floating cells that contain the principal, interest rate, and number of payment periods, and yet another to calculate the amount of each payment. When you change the principal or the interest percentage and calculate the document, all the other cells automatically update quickly and easily.

TROUBLESHOOTING

PASTING UNFORMATTED TEXT

Sometimes when I paste text, it's not the right font.

When you copy text from another source, you also copy formatting codes. To paste unformatted text, choose Edit, Paste Special, and choose Unformatted.

KEEPING FILES SMALL

Some of my documents are getting huge and taking up a lot of disk space. All I've done is drag some data into them from Excel.

This is a common problem with documents that contain OLE objects. For example, a WordPerfect document with a simple clip art object might be only 25KB in size, but if you edit the graphic in the Draw program, it becomes an OLE object and the document increases in size to more than 100KB. Instead, you might consider editing the clip art image outside of WordPerfect (for example, in Presentations), save the clip art image, and then insert the image into your WordPerfect document. The only other way to avoid this is to avoid using OLE, because this is a problem associated with the OLE technology, not with WordPerfect itself. You have to determine whether you want small files, or the convenience of editing objects in place in WordPerfect.

KEEPING DATA UP TO DATE

I imported information from a company database, but now someone updated the database and my document doesn't match.

Instead of importing a database that might change, choose Insert, Spreadsheet/Database, Link. That way, if the database changes, you need only update the link, not the whole database.

Adding a Formula to a Floating Cell

I can't seem to add a formula to a floating cell.

Open Reveal Codes and make sure the insertion point is positioned between the floating cell codes. Then, you can use the Formula toolbar to create a floating cell formula.

Ignoring Values in Text Cells

I created an invoice using a table, but when I calculate the total due, it's always wrong. I checked the formulas and they're all correct.

Check to see whether your formula includes a text cell, and whether that text cell contains any numbers. WordPerfect ignores text and uses the numeric value of a cell that contains both text and numbers. For example, if you're adding an entire column, and the top cell contains an invoice number, the value of the invoice number is added to the total of the column.

To avoid this problem, right-click the cell, choose Format, and in the Cell tab of the Table Format dialog box, choose Ignore Cell When Calculating. Then recalculate the table, and the formula should now yield the correct result.

PART VI

Publishing Documents

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CHAPTER 14

Collaborating on Documents

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Inserting Document Comments

Those sticky notes have really taken off, haven't they? They take up an entire aisle at the office supply store—along with all the desk accessories to hold them. I've got one on my monitor right now that reminds me of my submission dates!

WordPerfect offers an electronic equivalent to sticky notes—it's called a document comment. Comments can be inserted into a document, and they remain invisible until you open them. They aren't printed and they don't affect the formatting of the document. Consider the following uses:

- Store an idea as a comment, and then return to the comment later to develop the idea.
- Create a comment to remind yourself (or someone else) to come back and check the accuracy of a statement.
- Place instructions inside comments throughout onscreen forms to eliminate the need for printed instructions on how to fill out the form.

Comments are a valuable collaboration tool. Every member of a team that works on a document can insert his or her own comments, which can easily be differentiated from other comments. These comments might include suggestions for improving the document, changes to facts and figures, corrections, feedback, follow-up instructions, and other types of editing queries.

NOTE

If you take a few seconds to fill in some information, your comments can be identified with your initials and a color. Choose Tools, Settings, Environment. Type your name and initials in the text boxes. Click the User Color button to choose a color from the palette. The color is used for the comment balloon icon that appears in the margin and for the comment bubble that displays the comment text.

Creating Comments

When you're ready to create a comment, click in the section of text that you want to comment about. You don't have to be at the beginning of a line or at the top of a paragraph. You'll find that when you view the comment, an arrow points to the spot where you created the comment, so it's easy for the reviewer to see exactly what you are talking about. You can apply formatting to the comment text (such as add bold or italic, change the font) and you can insert graphics, tables, equations, charts, spreadsheets, and so on.

To create a comment, choose Insert, Comment, Create. The insertion point moves into the comment-editing window (see Figure 14.1). The property bar now has some helpful buttons for creating and editing comments. Hover over each button to display a QuickTip with the button name and a brief description.

TIP FROM

If you've already typed the text that you want to put in a comment, select the text, and then choose Insert, Comment, Create. The selected text is moved into the comment-editing window.

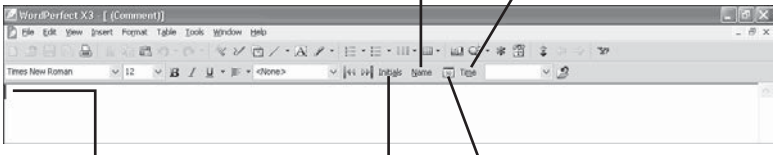

Figure 14.1
Comments are created in a separate editing window. The property bar in this window has buttons for creating comments.

Type the text of the comment in the window. Using the buttons on the property bar, insert your initials, your name, the date, or the time. Click the Close button on the property bar when you're done.

In Page view, you can see the comment balloon icon (with the initials and the color you chose in Environment Settings) inside the left margin. If you don't specify initials or a user color in Environment Settings, the comment icon looks like a white bubble (see Figure 14.2).

NOTE

If you can't see these icons, click the Zoom button and choose Page Width, or click the left horizontal scroll arrow until the left margin space comes into view.

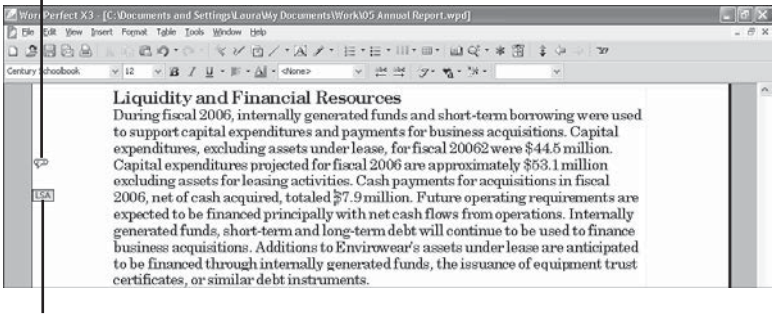

Figure 14.2
Comment balloon icons are inserted in the left margin, so you might have to adjust the zoom setting or scroll over to the left to see them.

If you still can't see the margin icon after you've adjusted the zoom (or scrolled over to the left), see "Enabling Margin Icons" in the Troubleshooting section at the end of this chapter.

In Draft view, comments appear in the text inside a shaded box. If you created the comment in the middle of the line, the beginning of the line appears above the comment box; the end of the line appears below (see Figure 14.3). Most people find the shaded comment boxes too distracting, so they switch to Page view, where the comments stay hidden.

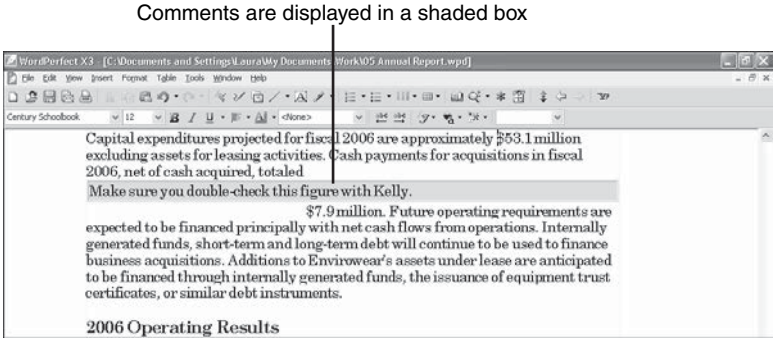

Figure 14.3
In Draft view, comments are displayed in a shaded box, and if inserted in the middle of a paragraph, the paragraph will appear split apart at that point.

VIEWING AND WORKING WITH COMMENTS

Page view is the preferred mode for working with comments because the comments stay hidden until you are ready to look at them. To view the contents of a comment, click the balloon icon in the left margin. The comment text appears in a balloon, with the arrow pointing down to the text where you created the comment (see Figure 14.4).

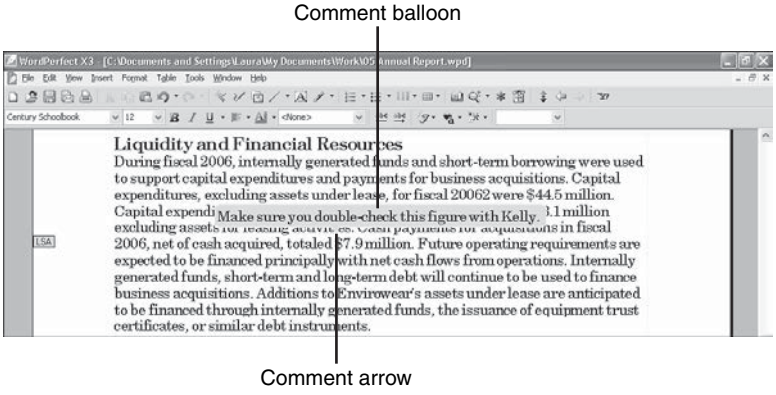

Figure 14.4
The arrow at the bottom of the comment bubble points to the place in the text where the comment was created.

You can do a few other things with comments:

- To edit a comment, right-click the comment icon or the comment text and choose Edit. You can also double-click the comment icon.
- While you're in the comment-editing window, choose File, Print to print the comment.

- To delete a comment, right-click the comment icon or comment balloon and choose Delete.

TIP FROM

Laura Acklen

Remember that you can delete a code by clicking and dragging it out of the Reveal Codes window. To strip out all the comment codes in one fell swoop, use Find and Replace to search for comment codes and replace them with nothing.

➔ To learn more about the steps used to insert a code in the Find and Replace dialog box, **see** "Searching for Codes," **p. 128**.

- To convert a comment to text, right-click the comment text. Choose Convert to Text. The text of the comment is inserted right where you created the comment—it replaces the comment code.
- If the initials have been supplied in the User Information section (choose Tools, Settings, Environment), you can view information about when a comment was created, even if the date and time stamps weren't used. Right-click the comment balloon icon or the comment bubble, and then choose Information. The Comment Information dialog box appears (see Figure 14.5).
- If you would prefer to hide the comment icons so they don't appear at all, you can deselect the Margin Icons option in Settings. Choose Tools, Settings, Display. Click the Document tab, and then remove the check mark next to Margin Icons.

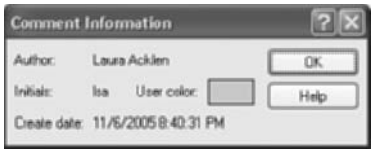

Figure 14.5
The Comment Information dialog box displays the properties for a comment.

USING THE HIGHLIGHT TOOL

Even the most stubborn opponents of automation can't deny the efficiency of working with information electronically. But hey, you go ahead—print the document and highlight the important passages with a highlighter pen. I'll stay right here and highlight the text onscreen with WordPerfect's Highlight tool and a few mouse clicks.

Just like a highlighter pen, the Highlight feature paints a bar of transparent color over the text. Just think about it—you can use different colors to color code certain types of information or you can ask fellow collaborators to choose different colors.

There are two ways to highlight text:

- To highlight existing text, select it, and then click the Highlight button. The currently selected color is used to highlight the text (see Figure 14.6).

- You can turn on the Highlight feature so that you can select text and apply highlighting in one step. Click the Highlight button, and the mouse pointer changes to a pen highlighter. Click and drag through the text you want to highlight. When you release the mouse button, WordPerfect applies the highlighting. When you're finished highlighting text, click the Highlight button again to turn highlighting off. Again, the currently selected color is used.

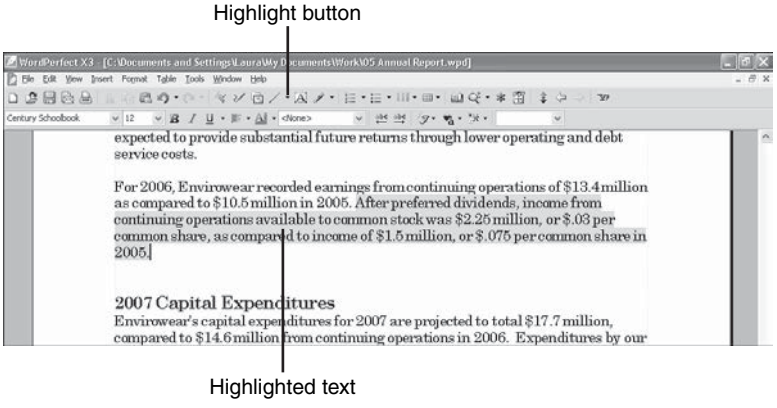

Figure 14.6
Just as you can use a highlighter pen to emphasize important information on a printed document, you can use WordPerfect's Highlight feature to highlight text onscreen.

REMOVING HIGHLIGHTING

To remove highlighting from a section of text, click in the text, and then click the Highlight button. You can remove multiple instances of highlighting all at once by selecting the text that contains the highlighted sections and choosing Tools, Highlight, Remove. Finally, there is a Highlight command on the right-click menu that you can use to turn the Highlight feature on and off.

CHANGING THE HIGHLIGHT COLOR

The default highlight color is yellow, but you can choose any color you like from the palette. Click the arrow next to the Highlight button to open the color palette, where you can select another color. It's a good idea to choose a light color—the darker colors can make it difficult to read the highlighted text.

NOTE

> When you select a different highlight color, the change is sticky, which means that the new color replaces the default color.

Highlighted text prints out in color on a color printer, and it prints as shaded text on a black-and-white printer. To print the document without the highlighting, you can temporarily hide the highlighting (but not the text on which the highlighting appears). Choose Tools, Highlight, Print/Show.

NOTE

> If you're planning on sending this document to someone else to review onscreen, be nice and go easy on the highlighting. You don't want the reader to burn out his retinas trying to read the text.

REVIEWING DOCUMENTS

The Internet is the world's virtual post office—these days it seems as though everyone has an e-mail address. Collaborating with people all over the world is as simple as attaching a file to an e-mail message and distributing it. But when you have a handful of people working on the same document, keeping track of the revisions can be a nightmare.

WordPerfect's Document Review feature can be used by both reviewers and the document's author. First, a reviewer uses Document Review to insert revisions (in a unique color). Then, you (the author) use the Document Review feature to find every revision (no matter how small). Each reviewer has a unique color, so each revision can be traced back to the person who made it. You can accept or reject each change, because you have the ultimate control over the document!

MAKING REVISIONS

If someone has sent a document to you, you are considered the reviewer. You'll have your own color, so your changes can easily be distinguished from those of other reviewers.

To add revisions with Document Review, open the document, and then follow these steps:

1. Choose File, Document, Review. The Review Document dialog box appears (see Figure 14.7).

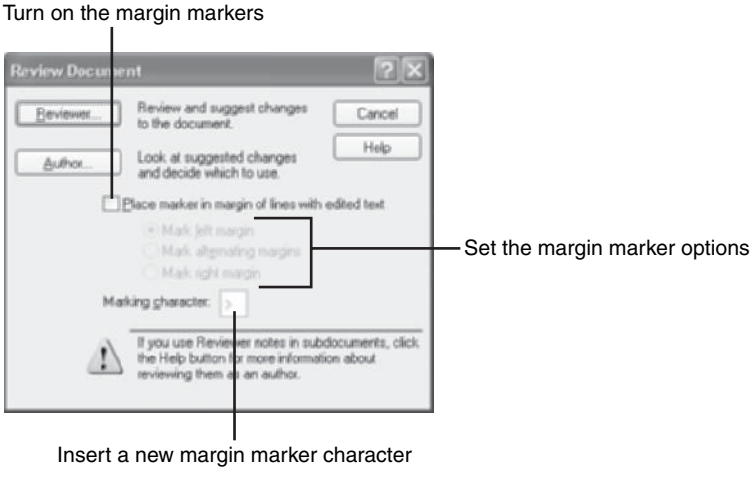

Figure 14.7
You can use the Review Document feature as a reviewer or as the author.

NOTE

> If a document has already been saved with revision marks, the Review Document dialog box appears automatically when you open that document. Click Cancel if you don't want to use Document Review.

2. Click Reviewer. A Reviewer property bar appears at the top of the document. Your color is displayed in the Set Color button. Colors that have already been used are displayed, with the username, in the Other User Colors list box (see Figure 14.8).

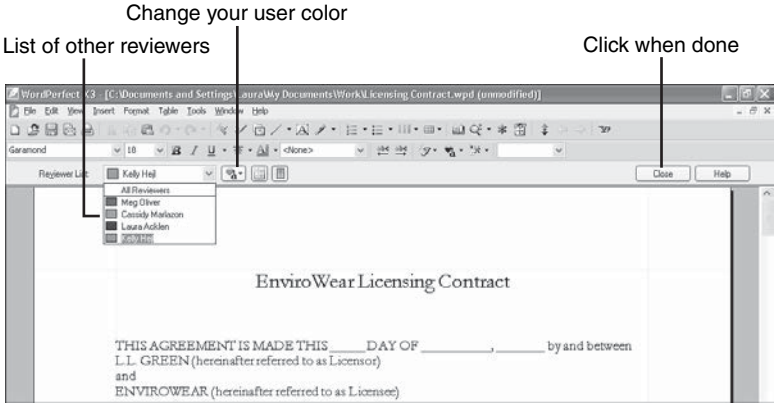

Figure 14.8
The Reviewer property bar displays a list of reviewers and their user colors.

3. If you want to change your color, click the Set Color button, and then choose a color from the color palette.
4. Make your revisions to the document. If you add text, it appears in your user color to indicate redline text. Deleted text appears in your user color, with a line running through it to indicate strikeout text.
5. When you're finished, click the Close button on the Reviewer property bar.

NOTE

> You can edit revisions made by other reviewers, but you can't edit text that has been deleted by another reviewer. The only way to release that text is to review the document as the author and reject the deletion.

CAUTION

> When you switch back to the document window, you won't be able to see the revision marks. Don't panic when you don't see your changes. They are there—they just aren't displayed in the user color.

When you're revising a document, you can do just about anything to it—you can change the margins, change the font, add headers and footers, add graphics, and so on. However, your user color is only tied to textual changes—that is, whatever you type in. For example, if you create a header, the header text appears in your user color.

➔ For the steps to create a header, **see** "Adding Headers and Footers," **p. 205**.

TIP FROM

Each reviewer is identified by the username in the User Information section of Environment Settings. If you share a computer, you have to remember to type your name and initials each time you start WordPerfect, or your revisions will be identified with someone else's name. A macro that does that for you would be very handy.

➔ For more information on creating macros, **see** "Creating Macros," **p. 573**.

REVIEWING A MARKED-UP DOCUMENT

As the document's author, you have control over which revisions are actually made and which are discarded. As you review the document, each revision is selected. You can accept or reject each change individually, or you can accept or reject all changes at once. Inserted text displays in the user's color to represent redlined text; deleted text displays in the user color with a dash through to indicate strikeout text.

To review a document as an author, open the document, and then follow these steps:

1. Choose Author in the Review Document dialog box to display a Reviewer property bar at the top of the document (see Figure 14.9). This property bar is different from the property bar that you see as a reviewer. This one contains buttons for accepting and rejecting the revisions. WordPerfect selects the first revision and waits for you to accept or reject it.

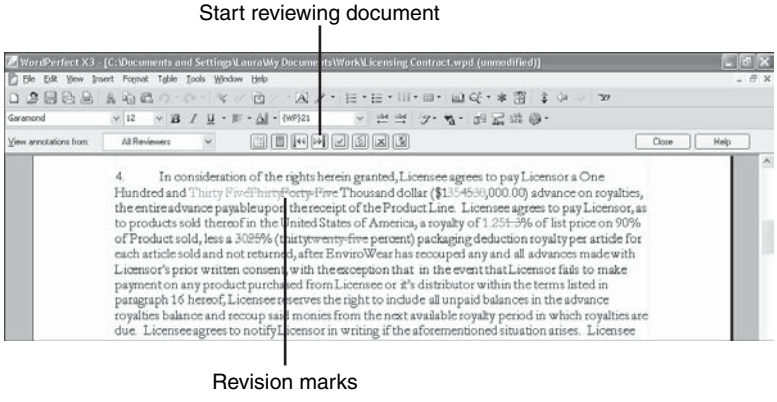

Figure 14.9
You can selectively accept or reject each revision individually or you can choose to accept or reject all of them at once.

2. Use the buttons on the Reviewer property bar to review the document:

Click the Turn On or Off the Margin Markings That Have Been Made in the Document button to turn the display of the margin markers on and off.

Click the Display Annotations in Normal Text Color button to turn off the redline and strikeout colors.

Click the Select the Previous Annotation button to move to the previous revision.

Click the Select the Next Annotation button to move to the next revision (or to start reviewing the document).

Click the Insert the Currently Selected Annotation into the Text of the Document button to accept the revision.

Click the Inserts All Annotations into the Document Text button to accept all the revisions at once.

Click the Deletes the Currently Selected Annotation button to reject a revision.

Click the Deletes All Annotations from the Document Text button to strip out all the revisions.

3. Click the Close button when you're finished, and then save the document.

TIP FROM

Change your mind about accepting or rejecting a revision? Click the Undo button to reverse the action.

CAUTION

Be careful when saving a document that contains redline and strikeout text to a different file format (such as Microsoft Word .doc format). The redline and strikeout text could be converted to plain text in the process, which would destroy your ability to accept or reject the changes.

If you see the Review Document dialog box when you open certain documents, and you want to get rid of it, see "Getting Rid of the Review Document Dialog Box" in the Troubleshooting section at the end of the chapter.

ROUTING DOCUMENTS

WordPerfect has always had powerful tools for reviewing documents. In WordPerfect version 11, a collaborative review feature was added. You can now route a document (as an e-mail attachment) to multiple reviewers, in a specific order. Each reviewer opens the attachment, makes her changes/comments, and closes the document. The document is then routed to the next person on the list. When the document has been reviewed by everyone on the list, it is sent back to you.

NEW In WordPerfect version 11 and 12, the document routing feature could only be used if you had Microsoft Outlook installed on your system. Now, WordPerfect X3 integrates with the recently introduced WordPerfect MAIL so you have a choice. You will be able to choose reviewers from the Microsoft Outlook address book, the WordPerfect MAIL address book, or the WordPerfect address book. The figures in this chapter show the use of the WordPerfect MAIL address book for document routing.

NOTE

> To use the new routing feature with Microsoft Outlook, you must have Microsoft Outlook 2000 (or newer) on your system and have the Outlook address book designated as the default address book. To set the Outlook address book as the default, choose Tools, Settings, Environment, and then enable the Use Outlook Address Book/Contact List check box.

To route a document, you must first create a routing slip. The routing slip contains a list of recipients, in a specific order, and a message explaining what you want the reviewers to do.

To create a routing slip

1. Choose File, Document, Routing Slip. The Routing Slip dialog box appears (see Figure 14.10).

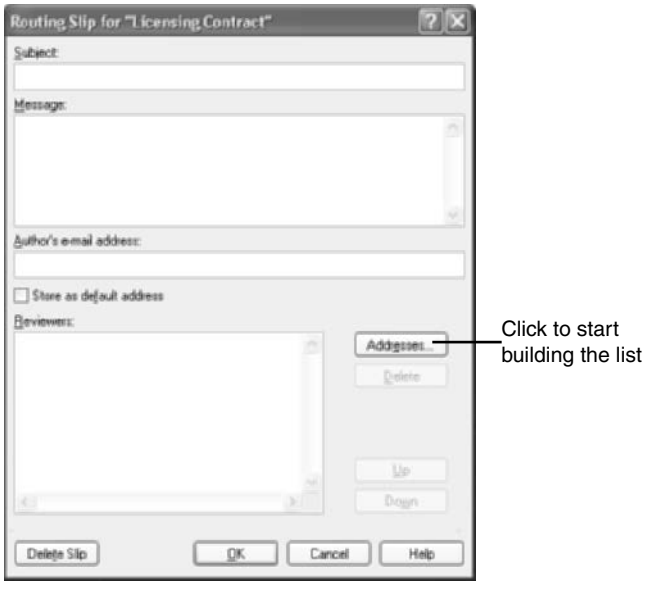

Figure 14.10
Build a list of reviewers and give them instructions in the Routing Slip dialog box.

2. Type a subject in the Subject text box.
3. (Optional) Type a message in the Message text box. This is a great place to leave instructions for the reviewers.

4. Click Addresses to start creating a list of reviewers. If you are using Microsoft Outlook, you'll see the Add Reviewers dialog box; otherwise, you'll see the WordPerfect Address Book dialog box (see Figure 14.11).

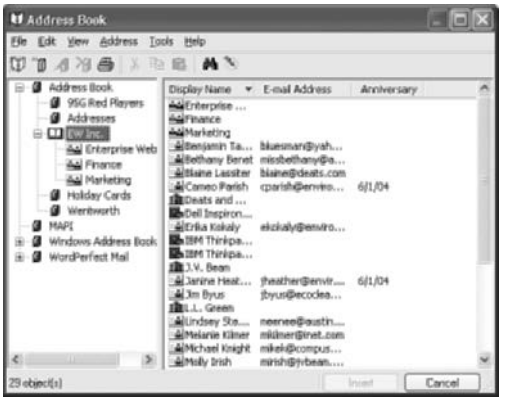

Figure 14.11
The Address Book dialog box lists the available address books.

5. Select the reviewer(s) in the list. Remember, you can click the first name, and then hold down the Ctrl key to select the others.
6. Click the Insert button to add the selected names to the Message Recipients list box.
7. Choose OK to return to the Routing Slip dialog box.
8. If you need to rearrange the reviewer names, select a reviewer name and then choose Up or Down. The document will be sent out to the reviewers in the order they appear on the Routing Slip so this is an important step.
9. Choose OK.

To give you an idea of what happens next, a reviewer will double-click the attached document in their email program. He will type his name and choose a color for his changes. After he is done making changes, he can either save the document and send it later, or he can send it on to the next reviewer. In addition, a reviewer can reassign a document to another reviewer on the routing slip. Presumably, this is so someone can send it back to a previous reviewer so that their comments can be reviewed.

Each reviewer can see the names of the other reviewers and their colors, so she can figure out who made what changes. A reviewer can edit additions made by other reviewers, but she will not be able to edit or undo previous deletions.

NOTE

This document routing feature is similar to the routing slip feature in Microsoft Word so you have the same functionality in both programs. However, you won't be able to import routing slips that were created in a Microsoft Word document.

NOTE

Remember, in WordPerfect X3, you can either use the Outlook Address Book or the WordPerfect Address Book (and through it, the WP Mail address book), but not both at the same time. If you want access to the WordPerfect Address Book (and the WP Mail address book), you'll have to go back into Settings and disable the Outlook integration. Choose Tools, Settings, Environment, and then remove the check mark next to the Use Outlook Address Book/Contact List check box.

COMPARING DOCUMENTS

Despite all the advantages electronic file transfers can bring, you might be reluctant to distribute your documents electronically because of the possibility of accidental (or intentional) changes being made to the text.

Only by comparing a reviewed document to the original can you be sure no unauthorized changes were made. The Document Compare feature compares two copies of a document and inserts revision marks for you. If text has been added, it's displayed in redline; if text has been deleted, it's copied back into the document as strikeout text. If so much as a space has been changed, you'll know about it.

NOTE

The Document Compare feature is designed to compare two documents in WordPerfect format. If you try to compare documents in different formats, you'll get unpredictable results.

USING THE COMPARE DOCUMENTS FEATURE

To compare two documents, open the reviewed copy of the file first. Then, compare that document to the original. The differences between the two documents will be clearly marked.

To compare two documents, follow these steps:

1. Open the reviewed copy of the file.
2. Choose File, Document, Compare to display the Compare Documents dialog box (see Figure 14.12).
3. Type the filename for your copy of the document, or click the Files icon to browse for the file.
4. Choose one of the two options:
   - Click Compare Only to compare the two documents and insert revision marks.
   - Click Compare/Review if you want to compare the two documents, and then review the document as an author.

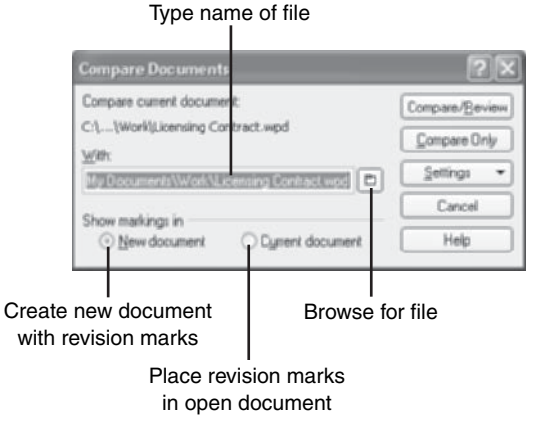

Figure 14.12
Type the name of the file you want to compare to your own in the Compare Documents dialog box.

When the comparison is complete, a Document Compare Summary page is created at the top of the document (see Figure 14.13). Scroll down past this page to review the document. Text that has been inserted appears in red, and text that has been deleted appears as strikeout text.

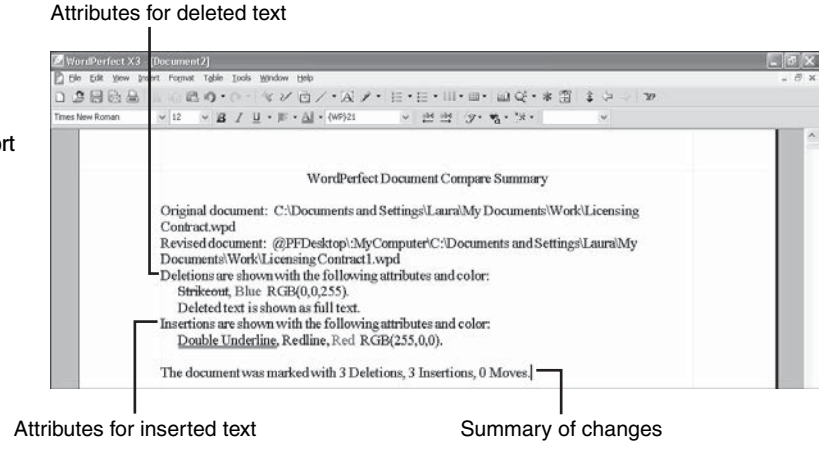

Figure 14.13
The Document Compare Summary page is a useful report to save as confirmation that two documents are identical.

If you choose Compare/Review after the compare is complete, WordPerfect sets you up to review the document as an author with the Document Review feature (discussed earlier in this chapter in the section "Reviewing a Marked-Up Document").

Because WordPerfect inserted all those revision marks in your document, it only seems fair that WordPerfect should take them back out. Choose File, Document, Remove Markings to display the Remove Markings dialog box (see Figure 14.14). Choose one of the options to remove the redline/strikeout text.

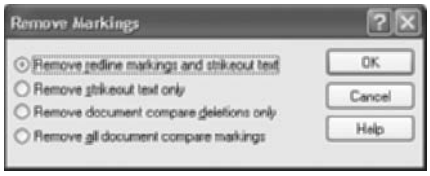

Figure 14.14
You can use the Remove Markings dialog box to strip out redline and strikeout text in any document, not just a compare document.

If you're not pleased with the way the redlined text looks and prints, you can change the way that text is formatted. Choose File, Document, Redline Method to open the Redline dialog box (see Figure 14.15). Choose a method for marking redlined text. If you choose one of the margin marking options, you can alter the redline character that appears inside the margin.

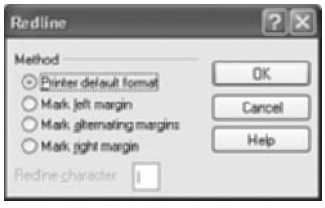

Figure 14.15
If you're not happy with the way your printer handles redline text, choose one of the margin-marking options.

If the redlined text prints only slightly lighter than the rest of the text, or if it appears no different from the rest of the text, see "The Redline Text Isn't Printing Correctly" in the Troubleshooting section at the end of the chapter.

CUSTOMIZING THE DOCUMENT COMPARE FEATURE

The magnet that attracts so many loyal WordPerfect users is the incomparable capability to customize features. The Document Compare feature is no exception, and users of previous versions of WordPerfect will be pleased with the depth of the new Document Compare Settings options that were introduced with WordPerfect 10.

There are separate customization options for the Compare Only option and the Compare/Review option. Both can be accessed in the Compare Documents dialog box, so choose File, Document, Compare to open this dialog box.

To customize the Compare Only option, click the Settings button; then, choose Compare Only to open the Document Compare Settings dialog box (see Figure 14.16).

The Document Compare Settings dialog box has four other tabs:

- **Insertions**—Click the Insertions tab to select an attribute for marking new text. The default is for redline, double-underline. You can also choose a different color and an enclosure character for the new text.
- **Deletions**—Click the Deletions tab to choose an attribute for deleted text (besides strikeout). You can choose a different color, and you can select an enclosure character. You can also choose how you want deleted text shown.

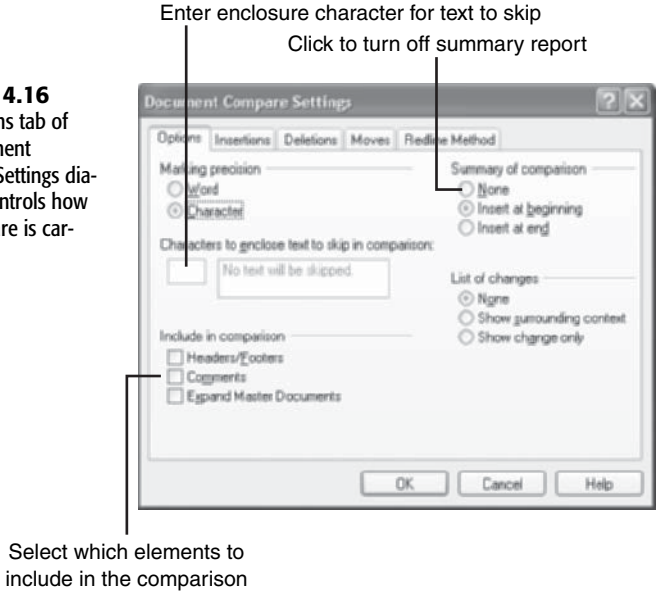

Figure 14.16
The Options tab of the Document Compare Settings dialog box controls how the compare is carried out.

- **Moves**—Click the Moves tab to choose where moved text appears. You can choose a color for moved text.
- **Redline Method**—Click the Redline Method tab to select a different type of redline marking and a different redline character. The options are identical to those in the Redline Method dialog box you open by choosing File, Document, Redline Method.

To customize the Compare/Review option, click the Settings button, and then choose Compare Then Review to open the Compare-Then-Review Settings dialog box (see Figure 14.17).

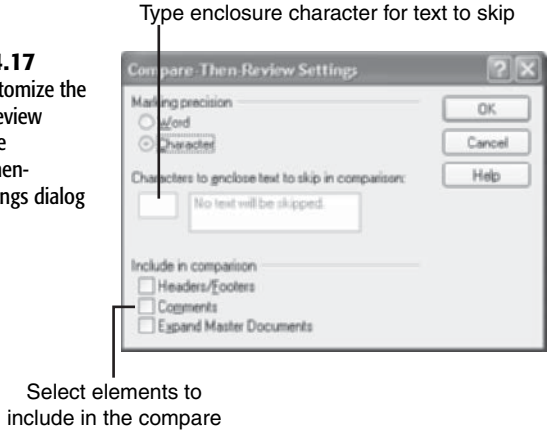

Figure 14.17
You can customize the Compare/Review option in the Compare-Then-Review Settings dialog box.

ADDING A DIGITAL SIGNATURE

Digital Signatures were introduced in WordPerfect 10. You can add a digital signature to a document, which guarantees that it has not been altered since you signed it, and that you are actually the person who prepared the document. For example, if you collaborate on sensitive documents and use e-mail to send the file to others, it's particularly important that you be able to prove that you are the person who has sent it and that no one else has modified the document since you signed it. Think of it as an electronic driver's license or passport.

Digital signatures are used to authenticate the identity of individuals who are exchanging information across the Internet. Through the magic of asymmetric cryptography, two keys can be created—one is the public key and the other is the private key. The public key can be used to verify the private key, but it cannot be used to identify the private key. As long as the private key remains confidential, the identity cannot be forged.

NOTE

WordPerfect Office X3 supports digital signatures from within WordPerfect, Quattro Pro, and Corel Presentations. For digital signatures to function properly, you must have Microsoft Internet Explorer (IE) 5.5 or later on your system (IE6 is required for WinXP or Win2K SP3 or higher). Even if you have another browser installed, such as Netscape or Opera, digital signatures will not work unless you have IE installed. WordPerfect Office X3 includes Microsoft IE 6 (the browser component only). Visual Basic for Applications (VBA) 6.3 is also included, but it is not installed in a typical installation, so you need to do a custom install to get the VBA components. If you are using IE in a language other than English and you don't want to install IE 6, go to `www.microsoft.com/downloads` and download the most recent version. If you choose not to install IE6 on your system (by deselecting the digital signatures component), and you do not have IE 5.5 installed (or IE 6 for WinXP and Win2K SP3 systems), you will not be able to use digital signature technology on your system.

If you don't want to install Internet Explorer 6 and the digital signature updates, see "How Can I Avoid Installing Internet Explorer 6?" in the Troubleshooting section at the end of the chapter.

SIGNING A DOCUMENT WITH A DIGITAL SIGNATURE

Before you can add a digital signature to a document, you have to obtain a digital certificate and install it on your computer. After this is done, you can sign the document.

Choose File, Signature, Sign Document, or click the No Signature button on the application bar to open the Sign Document dialog box (see Figure 14.18). Open the drop-down list, choose a signature from the list, and then choose OK.

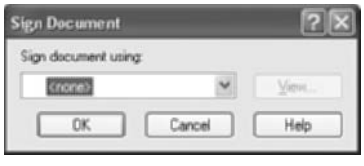

Figure 14.18
The Sign Document dialog box shows if a signature is valid.

If the signature is valid, you'll see a Signature Valid button (green check mark) on the application bar. If the signature can't be verified, you'll see a Certificate Not Valid button (yellow exclamation point). And if the signature isn't valid, you'll see a Signature Invalid button (red X) .

To view the certificate for a digital signature, choose File, Signature, Sign Document. Select the signature from the list and then choose View.

Detailed information about the digital certificate is displayed on the Information tab of the Certificate dialog box, including the name of the entity that issued the certificate, the dates the certificate is valid, and any intended uses of the certificate, as shown in Figure 14.19. You can also click the Signature Valid, Certificate Not Verified or Signature Invalid button on the application bar.

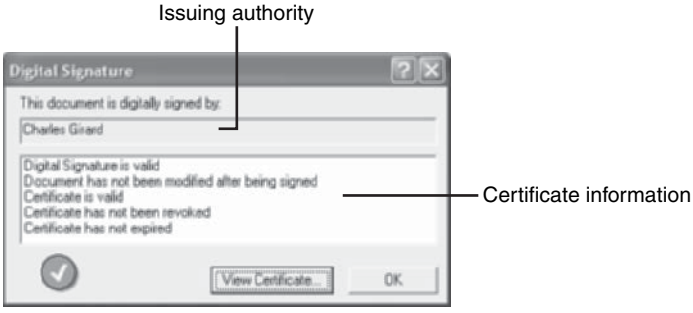

Figure 14.19
The Certificate dialog box offers information about the certificate.

Selecting a Validation Method

A digital signature remains valid as long as it hasn't expired and has been distributed by a valid authority. You can choose the method for validating digital signatures on your system. Choose File, Signature, Sign Document. Choose a signature from the drop-down list, and then choose View to open the Certificate dialog box. Click the Validation tab to display the validation methods. Choose from the following options:

- If you enable the Check Parent Certificates check box, WordPerfect checks the intermediate certificates of authority listed in your browser.
- With the Check Parent Certificates check box enabled, you can enable the Check Root Certificate, in which case WordPerfect checks the highest level of authority or trusted root certificates of the authority listed in your browser.
- If you enable the Check the Certificate Authority check box, WordPerfect accesses the Internet to determine whether a certificate authority is valid.
- Finally, if you disable the two check boxes, WordPerfect merely checks to see whether the file has been altered since it was signed.

TROUBLESHOOTING

ENABLING MARGIN ICONS

I've just created a bunch of comments, and even though I changed the zoom setting to Page Width, I can't see the comment icons. What's up with that?

There is a setting in the Display Settings dialog box that enables and disables the display of margin icons. Choose Tools, Settings, Display. Place a check mark next to Margin Icons to enable them. Use this option if you ever want to hide the comment balloon icons from view, in which case you would disable the check box.

GETTING RID OF THE REVIEW DOCUMENT DIALOG BOX

Whenever I open certain documents, the Review Document dialog box is open. I know I can click Cancel to get rid of it, but I want to get rid of it permanently. Is there some way to keep it from displaying when I open these documents?

Absolutely! All you have to do is accept all of the revisions, close the dialog box, and save the document. From then on, it won't be considered a "review" document. Here's how: Open the document. Select Author. You should now see the document in the editing window with a toolbar on top of it. In the middle of the toolbar, there is a button that has three check marks on it. Hover over it with your mouse. You should see a QuickTip that says Inserts All the Annotations Into the Document Text. Click this button to accept all of the revisions at once. Now, click the Close button on the toolbar. Save the document.

THE REDLINE TEXT ISN'T PRINTING CORRECTLY

I'm trying to print a document with redline and strikeout text. The strikeout looks fine, but the redline doesn't look any different from the rest of the text. What am I doing wrong?

By default, the redline method is controlled by the printer driver, not WordPerfect. Different types of printers can produce different forms of redline text. Open the document with the redline text. Choose File, Print, and then click the Advanced tab. Disable the Print in Color check box. Print the document—the redlined text should now print with a gray shaded background.

If this doesn't work for you, you can try the latest printer driver for your printer to see whether there is new functionality available.

HOW CAN I AVOID INSTALLING INTERNET EXPLORER 6?

I want to make sure that I don't install Internet Explorer (IE) 6 when I install WordPerfect. Is it possible to remove it if it's already been installed?

To make sure you don't install IE 6, start the Setup program and choose a "modify" or "change" install. For WordPerfect Office X3, deselect the following components: WordPerfect, Entrust Security Integration.

And yes, you can uninstall Internet Explorer 6 later using the WordPerfect Office X3 installation wizard.

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CHAPTER 15

Working with Large or Multipart Documents

In this chapter

by Laura Acklen

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INSERTING BOOKMARKS

Just as you can place a bookmark in a book, you can insert bookmarks into a long document, and then jump from section to section with just a few mouse clicks. In their simplest form, bookmarks help you to navigate through a long document. Raise the bar a little, and you'll use bookmarks to create hypertext links within a document. Raise the bar a little higher, and you'll use bookmarks to position the insertion point, or to move to the next prompt in a template. This section focuses on creating bookmarks to navigate through long documents.

➔ If you are ready to create a link to another part of a document, **see** "Creating Hypertext Links," **p. 448**.

➔ For more information on creating templates, **see** "Creating New Templates," **p. 482**.

INSERTING A BOOKMARK

A bookmark can be created to mark the beginning of a new chapter or section, a table or chart, the start of illustrative pages, or a section of text that is frequently revised—any position within a document. A bookmark can also be created to locate and select a portion of the text. The advantage of selecting text before you create the bookmark is that when you jump to that bookmark, the text is selected and you can then take action on the selection (such as moving or copying it).

Follow these steps to create a bookmark:

1. Click where you want to insert the bookmark, or select the text you want to use to create the bookmark.
2. Choose Tools, Bookmark to display the Bookmark dialog box (see Figure 15.1).

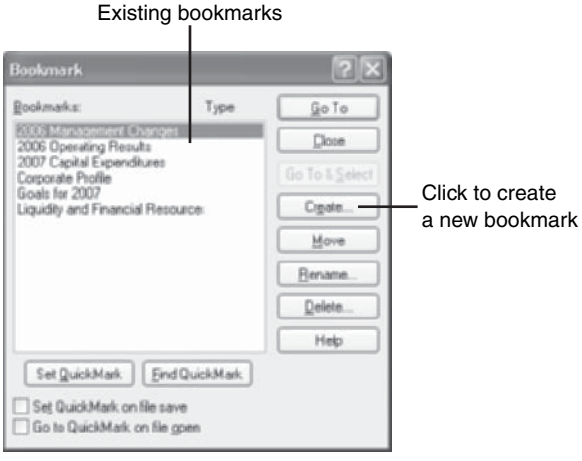


Figure 15.1
Existing bookmarks in a document are listed in the Bookmark dialog box. Double-click a bookmark in the list to jump to that part of the document.

CAUTION

If you've selected a chart or graphics object, the Bookmark command won't be available. Click in the document window to deselect the object, and then select the text around the object if you want to include it in the selection.

3. Click Create. The Create Bookmark dialog box appears (see Figure 15.2). If you've clicked in the document, the text following the insertion point appears in the Bookmark Name text box. If you selected text, the selected text appears in the Bookmark Name text box, and there is a check mark in the Selected Bookmark check box.

Figure 15.2
Type a name for the bookmark in the Create Bookmark dialog box.

4. If necessary, type another name for the bookmark in the Bookmark Name text box. Click OK to return to the document.

TIP FROM

If you have Reveal Codes turned on, you can double-click the Bookmark code to open the Bookmark dialog box.

Now that you know how to create bookmarks, you're probably wondering how you're going to use them to move around. Bookmarks are integrated into the Go To feature, so you can use Go To when you want to jump to a bookmark. Or, you can open the Bookmark dialog box and choose one there. Here's how you use Go To to select a bookmark:

- Press Ctrl+G, or click the position information on the status bar, to open the Go To dialog box (see Figure 15.3). Click Bookmark in the Go to What list box, and then choose a bookmark from the Select Bookmark drop-down list (see Figure 15.4 in the next section) .

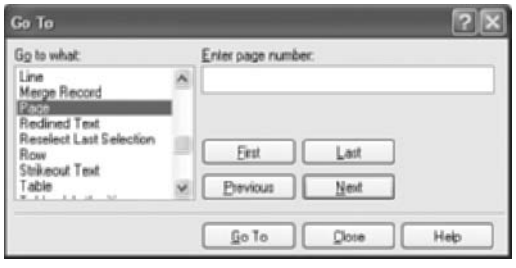


Figure 15.3
You can use the Go To dialog box to move between certain elements in a document. Go To will also reselect the last selection.

- Choose Tools, Bookmark. Select a bookmark, and then choose Go To. If you created the bookmark with selected text, and you want that text selected when you move to the bookmark, choose Go To & Select.

- Click the Browse By button and choose Bookmark. Now, click the Previous and Next buttons to move back and forth between bookmarks.

Bookmarks can be moved, renamed, and deleted in the Bookmark dialog box:

- To move a bookmark, click in the text where you want to place the bookmark. Choose Tools, Bookmark. Select the bookmark, and then choose Move.
- To rename a bookmark, choose Tools, Bookmark. Select the bookmark, and then click Rename. Type a new name for the bookmark in the Rename Bookmark dialog box, and then click OK.
- To delete a bookmark, choose Tools, Bookmark. Select the bookmark in the Bookmarks list box, and then click Delete. Click Yes to delete the bookmark, or click No if you change your mind.

CAUTION

If you accidentally delete an important bookmark, close the Bookmark dialog box, and then click the Undo button to restore it. Be sure to click Undo immediately after you delete the bookmark, or you risk the possibility of undoing the wrong action.

TIP FROM

Although you can't print out a list of your bookmarks, you can create a screen shot with the Bookmark dialog box open. You can then paste the screen shot into a blank document and print it for future reference. Choose Tools, Bookmark to open the Bookmark dialog box. Press Alt+PrintScreen to copy the screen to the Clipboard. In a document, press Ctrl+V or click the Paste button on the toolbar to paste in the screen shot. Finally, click the Print button to print the screen capture.

INSERTING QUICKMARKS

A QuickMark is a one-time-use bookmark that you can use to save your place in a document. You can have WordPerfect create a QuickMark at the insertion point whenever you save a document. The next time you open the document, you can jump to the QuickMark with one keystroke, or you can have WordPerfect take you there automatically.

To create a QuickMark, click in the text where you want to set the QuickMark, and then choose Tools, Bookmark, Set QuickMark. Or you can press Ctrl+Shift+Q to create the QuickMark.

To find a QuickMark, press Ctrl+Q or choose Tools, Bookmark, Find QuickMark. You can also open the Go To dialog box, and then choose QuickMark from the Select Bookmark drop-down list (see Figure 15.4).

TIP FROM

If you want WordPerfect to take care of setting the QuickMark whenever you save a document, choose Tools, Bookmark. Place a check mark in the Set QuickMark on File Save check box. Put a check mark in the Go to QuickMark on File Open check box if you want to jump to the QuickMark when you open the document again.

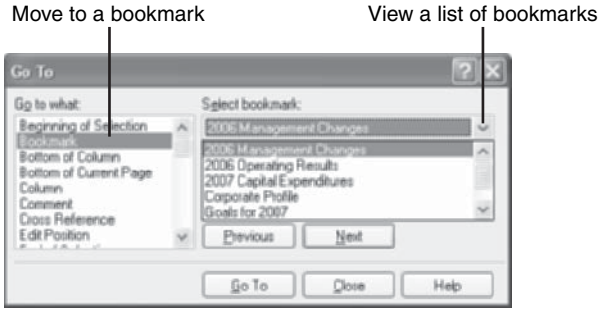


Figure 15.4
After you create a QuickMark in a document, QuickMark appears on the Select Bookmark drop-down list in the Go To dialog box.

ADDING FOOTNOTES AND ENDNOTES

Footnotes and endnotes provide additional information about what is being said in the body of the text without interrupting the flow of that text. They might contain reference details, such as the name of the author, the title of the work, and the page number where the information can be found. They might also provide parenthetic or interpretive explanations of technical material. Footnotes and endnotes should not contain essential information because their very location indicates that the author does not consider them required reading.

The process of creating and editing footnotes and endnotes is virtually identical. Because footnotes are more popular, this chapter focuses on them. The differences are mostly self-explanatory, so you shouldn't have problems using the information here to create and edit endnotes.

CREATING FOOTNOTES

A footnote has two parts: the footnote reference number and the footnote text. The footnote reference number is placed in the text when you create the footnote. The footnote text, along with a corresponding footnote number, is inserted at the bottom of the page. If the footnote is lengthy, WordPerfect splits the footnote and carries it over to the next page.

You can follow these steps to create a footnote:

1. Click in the text where you want the footnote reference number to appear.
2. Choose Insert, Footnote/Endnote to open the Footnote/Endnote dialog box (see Figure 15.5). WordPerfect suggests a footnote number, based on where you are in the document (before or after existing footnotes). If you want to create an endnote rather than a footnote, select Endnote Number.
3. Choose Create. What happens next depends on the view you're using. In Page view, the insertion point is placed at the bottom of the page in the footnote-editing area (see Figure 15.6). In Draft view, the insertion point is moved into a footnote/endnote-editing window. Either way, you have some new buttons on the property bar.

Figure 15.5
You can choose to create a footnote or an endnote in the Footnote/Endnote dialog box.

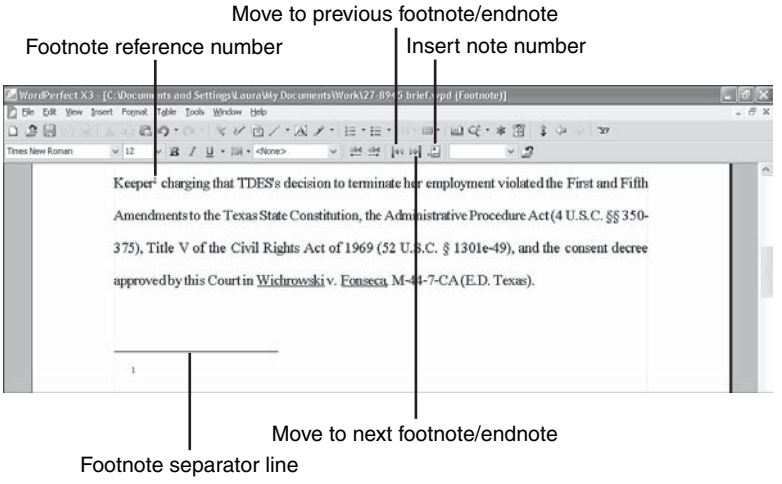
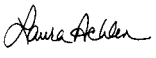


Figure 15.6
The footnote area is at the bottom of the page, right on top of the bottom margin, so you can reduce the bottom margin to allow for more footnotes on a page.

4. Type the text of the footnote.

TIP FROM



In Draft view, you can see the footnote numbers in the text, but you can't see the footnote text at the bottom of the page. Because they aren't displayed in the text, you have to create and edit footnotes in a separate footnote-editing window. I strongly recommend switching to Page view when you're working with footnotes and endnotes so you don't have to keep switching back and forth from the footnote-editing window to the document editing window.

TIP FROM

If you accidentally delete the note number in the footnote text, click the Note Number button to reinsert the number. Don't type the number yourself, or WordPerfect won't be able to update the note numbers as you edit the document.

5. Click the Close button, press Ctrl+F4, or in Page view, click in the body text to move the insertion point back into the text area. The footnote reference number appears in the text (see Figure 15.7).

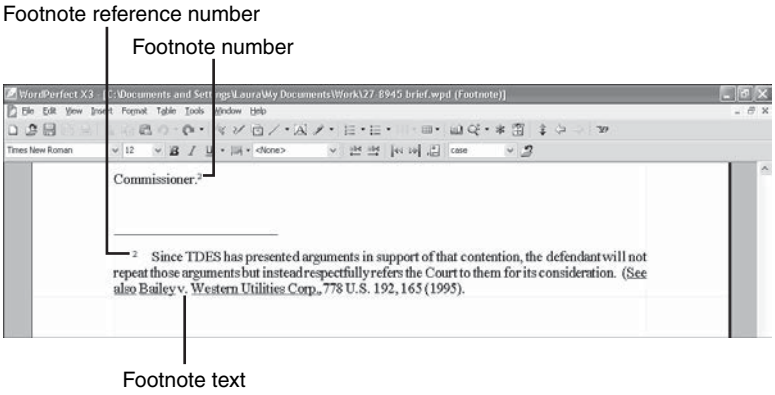


Figure 15.7
The footnote reference number is tied to a footnote code so the footnote numbers are automatically updated as you edit the document.

If your footnote numbers reset to 1 at the beginning of each page (and you don't want them to), see "My Footnote Numbers Keep Going Back to 1" in the Troubleshooting section at the end of this chapter.

EDITING FOOTNOTES

Editing footnotes in Page View mode is simple—just click in the footnote area and make your changes. To edit a footnote in Draft view, choose Insert, Footnote/Endnote, type the number of the footnote you want to edit in the Footnote Number text box, and then choose Edit. When you're done, click the Close button on the property bar. Also, in Draft view, you can double-click the footnote code in Reveal Codes. This opens the Edit Footnote dialog box with the correct footnote number supplied. Choose OK or press Enter to edit the footnote in the footnote editing window.

DELETING FOOTNOTES

To delete a footnote, select the footnote reference number in the text, and then press Delete. You could also click and drag the Footnote code out of the Reveal Codes window. Because this deletes the footnote code, both the footnote reference number and the footnote text are removed.

If you are having trouble deleting a footnote, see "I Can't Get Rid of a Reference Number" in the Troubleshooting section at the end of this chapter.

MOVING FOOTNOTES

You might decide after you've typed in the text of the footnote that the footnote should appear elsewhere in the paragraph. Or, you might decide that you need to create a footnote that is almost identical to this one, so you want to copy the footnote, and then make the small changes. Moving and copying footnotes is easy—just cut or copy, and then paste the footnote reference number, just as you would any other piece of text. Because the footnote reference number represents the footnote code, you're actually copying and moving codes without having to work in Reveal Codes.

➔ If you need a refresher on how to move and copy text, **see** "Moving and Copying Text," **p. 45**.

CAUTION

If the insertion point is inside the footnote area, the Footnote/Endnote option on the Insert menu isn't available. You have to click in the text and move the insertion point out of the footnote area to make the Footnote/Endnote option available.

FORMATTING FOOTNOTES

WordPerfect makes some assumptions for you so that you can create and edit footnotes without having to worry about creating a separator line or making sure there is enough room between the body text and the footnote text. The footnote number is a superscripted Arabic numeral, and the first line of the footnote is indented. However, you might have a reason to change these settings, and it's easy enough to do.

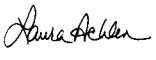
Choose Insert, Footnote/Endnote, Options, Advanced to open the Advanced Footnote Options dialog box (see Figure 15.8), where you can tweak the footnote options.

Figure 15.8
You can make adjustments to footnote formatting in the Advanced Footnote Options dialog box.

Here are some of the changes you can make in the Advanced Footnote Options dialog box:

- Click the Method drop-down list arrow, and choose a different numbering method (lowercase/uppercase letters, lowercase/uppercase Roman, or characters).
- Click In Text to edit the style for the footnote reference number.
- Click In Note to edit the style for the footnote text.

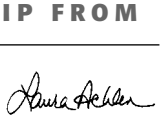
TIP FROM



It's fairly common to have footnote text in the same font as the document text, but in a smaller size. Click In Note to edit the footnote style, and then choose a smaller size from the Font Size drop-down list.

- Adjust the space between footnotes in the Space Between Notes text box.
- In the Amount of Footnote to Keep Together, specify how much footnote text you want kept together if the footnote is split across two pages.
- Put a check mark next to Insert (Continued) Message if you want WordPerfect to insert a continued message next to the separator line when a footnote is split across two pages.

TIP FROM



If a footnote is particularly long, you can force it to split between two pages. Press Ctrl+Enter to push the rest of the footnote text to the next page.

- Click Separator to open the Line Separator dialog box (see Figure 15.9). Make any necessary adjustments to the format of the separator line. You can also choose Options, Separator (in the Footnote/Endnote dialog box) to open the Line Separator dialog box.

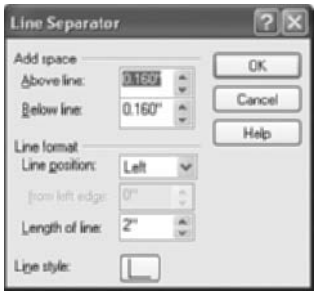


Figure 15.9
You can set the spacing, positioning, length, and line style for the separator line in the Line Separator dialog box.

ADDING ENDNOTES

By definition, endnotes are grouped together at the end of the document, rather than printed at the bottom of a page. You can control where the endnotes are compiled with endnote placement codes. For example, a long document can be divided into smaller files, perhaps at major headings or sections, and then combined for final formatting. If you want the endnotes compiled at the end of each section, rather than at the end of the document, insert an endnote placement code at the bottom of each file.

To insert an endnote placement code, choose Insert, Footnote/Endnote, Endnote Number, Endnote Placement. Choose Insert Endnotes at Insertion Point if you're compiling all the endnotes together, or choose Insert Endnotes at Insertion Point and Restart Numbering if you're compiling endnotes at the end of each section and you want to restart numbering at one in each section.

➔ For more information on breaking large documents into smaller pieces, **see** "Working with Master Documents and Subdocuments," **p. 411**.

FORMATTING ENDNOTES

Endnotes are grouped together on a page, so there are fewer options to set for them than there are for footnotes. In the Footnote/Endnote dialog box, choose Endnote Number, Options, Advanced to display the Endnote Options dialog box, which is an abbreviated version of the Advanced Footnote Options dialog box seen in Figure 15.8. Because endnotes are grouped together on a page, there is no need to position them, include a separator line, or print a continued message. Make your selections; choose OK when you are finished.

NOTE

Some aspects of the footnote/endnote features in WPX3 have been adjusted so they could be matched up with Word's footnote/endnote features. For example, the footnote and endnote numbering styles have different names, but the names have been matched up so the conversion between formats is more accurate. These changes improve the results of the conversion when you save documents in Word format, and when you open Word documents in WordPerfect.

ADJUSTING FOOTNOTE/ENDNOTE NUMBERS

If you ever need to make manual adjustments to the footnote numbers, in the Footnote/Endnote dialog box, select Options, Set Number to open the Footnote Number dialog box (see Figure 15.10). If you choose Endnote Number first, you get the Endnote Number dialog box, which looks the same as the Footnote Number dialog box.

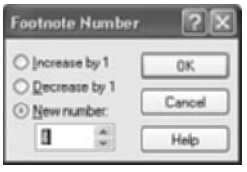


Figure 15.10
You can use the Footnote Number dialog box to adjust footnote numbers.

NOTE

Footnotes and endnotes, like headers, footers, page numbers, and graphics box captions, are considered a part of the document's substructure. As such, they are formatted differently than the rest of the text. WordPerfect uses the settings in DocumentStyle to format these elements. So, even if you change the font at the top of the document, the footnotes/endnotes (and other elements) will appear in the font specified as the document default font, or the font selected in the DocumentStyle, which might not match the font you inserted.

To make global changes to the document and the substructures, place all the formatting codes in the DocumentStyle. (The DocumentStyle code is always the first code in the document.) Either double-click the DocumentStyle code in Reveal Codes, or choose File, Document, Current Document Style to edit the DocumentStyle.

CONVERTING FOOTNOTES AND ENDNOTES

If you're really lucky, you have a boss or a professor who never changes the formatting guidelines for your reports. In the real world, however, that's not likely. One day you need footnotes, the next day, endnotes (and vice versa).

WordPerfect ships with two macros that completely automate the process of converting footnotes to endnotes and endnotes to footnotes. They are called footend and endfoot.

➔ For a complete list and the steps to run the shipping macros, **see** "Running the Shipping Macros," **p. 570**.

There are two ways to run these macros:

- Choose Tools, Macro, Play. In the Play Macro dialog box, scroll through the list of macros, and then double-click Footend or Endfoot.

CAUTION

> If you don't see these two macros, choose Tools, Settings, Files, and then click the Merge/Macro tab. Make a note of the location shown next to the Default Macro Folder. Now, choose Tools, Macro, Play and browse to that folder. You might have to scroll down through the list to find them.

- You can turn on a Shipping Macros toolbar for quick access to the macros that come with WordPerfect. Right-click the toolbar, choose More, and then place a check mark next to the Shipping Macros toolbar (see Figure 15.11). (You have to scroll down to see this one.) Click Close to clear the Customize Settings dialog box. Now, click the Convert End to Foot button, or the Convert Foot to End button.

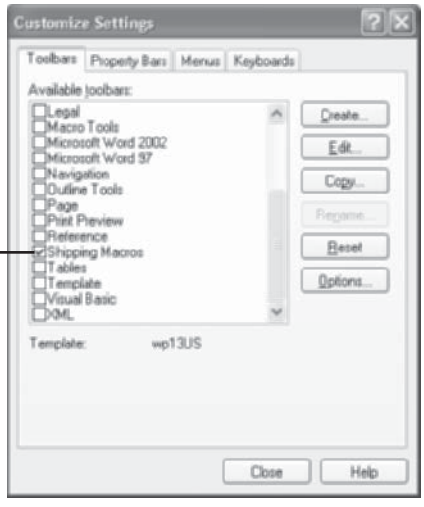


Figure 15.11
The More option on the toolbar QuickMenu takes you to a complete list of available toolbars.

CAUTION

> You can't select a portion of the document, and then run the macro to convert only specific footnotes or endnotes. The footend macro converts every single footnote to an endnote and the endfoot macro converts every single endnote to a footnote.

Simplifying a Complex Document with Cross-References

Navigating a complex document can be made much easier with cross-references. References to other pages, figures, tables, and definitions show a reader how fragments of information are linked together. (You might have noticed that this book is liberally sprinkled with cross-references to guide you to other parts of the book that discuss related or complementary features.)

A cross-reference can point to a page, chapter, or volume number; a footnote or endnote number; a paragraph/outline number; a caption number; a counter; or any combination of these. It can be as simple as "see 'Contract Terms' on page 35," or as complex as "refer to footnote 5 on page 78 in Chapter 13."

When you create a cross-reference, you mark the place in the text where you want to insert the reference information. Then, you mark the target, or the item that you are referencing. The two marks share a common name—that's how they are matched up when you generate the cross-references.

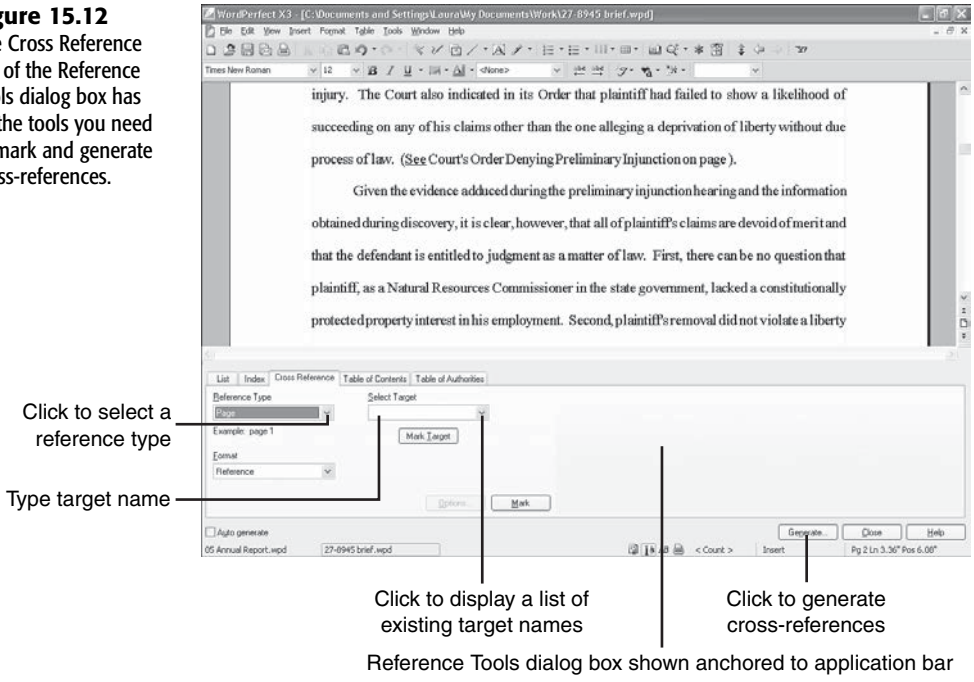
Marking References

References and targets don't have to be marked in any particular order, so you can mark the text as you type, or you can come back later and do it all at once. A reference in the text that refers to a nonexistent target displays a ? where the reference information should be. After you mark the target and generate the document, the question marks are replaced with the reference information.

Follow these steps to create a reference:

1. Type the descriptive text that precedes a reference. For example, type **`see 'Contract Terms' on page`**.
2. Position the insertion point where you want the reference to appear. Make sure you leave a space between the descriptive text and the reference.
3. Choose Tools, Reference, Cross-Reference. The Cross-Reference tab of the Reference Tools dialog box appears. Figure 15.12 shows the Reference Tools dialog box anchored to the bottom of the screen. The default reference type is page (for a page number), so if you're inserting a page number reference, you're all set to go.
4. If necessary, click the Reference Type drop-down arrow and choose a different reference type from the list.
5. Click in the Select Target text box and type a target name for the reference (or if you've already marked the target, click the drop-down list arrow and choose the target name from the list).

Figure 15.12
The Cross Reference tab of the Reference Tools dialog box has all the tools you need to mark and generate cross-references.



NOTE

The target name that you use to mark the reference must exactly match the target name that you use to mark the target. Target names are not case sensitive. If you're unsure of the target name, try marking the target first. When you mark the references to that target, the target name will already be in the list. Highly complex documents can have similar target names, in which case you should mark targets (and their associated references) one at a time.

6. Click Mark. WordPerfect inserts a reference code at the insertion point, and a question mark is used as a placeholder (see Figure 15.13).
7. If necessary, continue marking the references. When you are finished, click Close to clear the Reference Tools dialog box.

NOTE

Cross-references are a great way to point out related or complementary information in a long or multipart document. If the document will be reviewed onscreen, turn the reference text into a hypertext link that the reader can click to jump to the target. That way, readers can jump back to their places and continue reading.

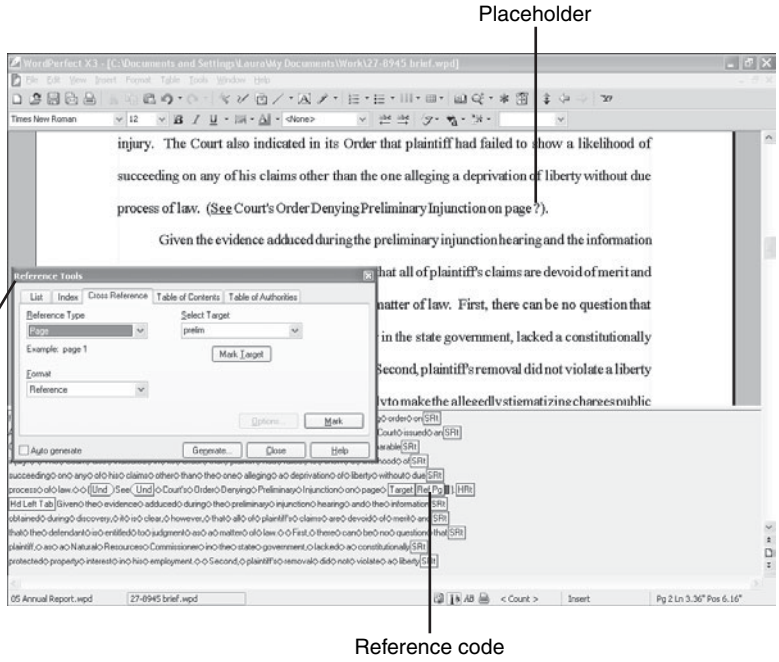


Figure 15.13
If you haven't marked the target yet, a question mark serves as a placeholder.

MARKING TARGETS

The target is the item that you want to refer to, so it might be a phrase, a footnote or endnote, a paragraph/outline item, or a graphics box. The trick to marking a target is to insert the code in the right place. Text references are easy—just click at the beginning of the phrase, paragraph, or section before you insert the code. To reference a footnote or endnote, you need to insert the code in the footnote or endnote text, not next to the footnote reference, as you might think. If you're referencing a graphics box, turn on Reveal Codes and position the red cursor right after the graphics box code.

TIP FROM

If you're worried that you might forget to include the target code should you ever have to move a graphic box, you can attach the target code to the graphic by placing the code inside a blank caption.

➔ For more information on creating graphics box captions, **see** "Adding Captions," **p. Web:12**.

Follow these steps to mark a target:

1. Position the insertion point either by clicking in the text or turning on Reveal Codes and positioning the red cursor.

2. If the Reference Tools dialog box isn't onscreen, choose Tools, Reference, Cross-Reference. The Cross-Reference tab of the Reference Tools dialog box appears (refer to Figure 15.12).
3. Click in the Select Target text box and type the target name, or click the drop-down list arrow to choose a target from the list.
4. Click Mark Target. If you have Reveal Codes turned on, you'll see that WordPerfect inserts a [Target (target name)] code at the insertion point.

If you made a few mistakes when you marked targets and references, see "I Typed the Wrong Target Name" in the Troubleshooting section at the end of this chapter.

GENERATING AUTOMATIC CROSS-REFERENCES

When you generate the cross-references in a document, WordPerfect matches the target names in the reference and target codes and inserts the reference information in the text. Depending on the complexity of the document and the references you've created, generating can put a strain on your computer's resources. For this reason, I highly recommend that you save the document beforehand.

To generate a document, click the Generate button in the Reference Tools dialog box, press Ctrl+F9, or choose Tools, Reference, Generate to display the Generate dialog box (see Figure 15.14). Click OK to generate the document.

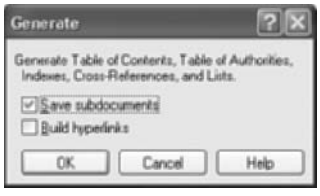


Figure 15.14
The Generate option updates all the marked entries in a document at once.

If the Generate button is grayed out, see "The Generate Button Isn't Available" in the Troubleshooting section at the end of this chapter.

➔ If you aren't sure whether you should select the Save Subdocuments option in the Generate dialog box, **see** "Generating Document References in Master Documents," **p. 415**.

TIP FROM

If you're working on someone else's document, and the references are so messed up that you just don't know where to start, you might consider stripping out all the target and reference codes and starting over. In some cases, it's just easier to start with a clean slate. Use Find and Replace to search for both the target codes and the reference codes, replacing them with nothing.

➔ To review the steps to use the Find and Replace feature to search for codes, **see** "Searching for Codes," **p. 128**.

CREATING A CROSS-REFERENCE TO A GRAPHICS BOX COUNTER

Counters are used to number graphics boxes, usually within the caption. For example, I could use a counter to automatically number each figure in this chapter. Counters can be used to number all types of graphics boxes (figure, table, text, user, or equation). You can create a reference to any type of graphics box by referencing the counter.

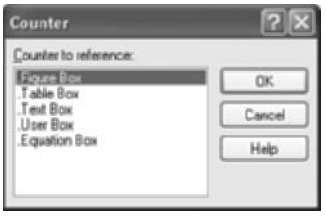
Follow these steps to create a cross-reference to a graphics box counter:

1. If you haven't already done so, insert the graphic(s) or box(es).

➔ For more information on creating graphics box captions, **see** "Adding Captions," **p. Web:12**.

2. Position the insertion point and type the descriptive text that precedes the reference. For example, type **`See Figure`**. Make sure you leave a space between the reference text and the reference.
3. If the Cross Reference tab of the Reference Tools dialog box isn't already displayed, choose Tools, Reference, Cross-Reference.
4. Open the Reference Type drop-down list, and choose Counter to display the Counter dialog box (see Figure 15.15).

Figure 15.15
You can select the type of graphics box that you want to reference in the Counter dialog box.



5. Click the graphics box counter type, and then click OK.
6. Type a target name in the Select Target text box or select the target name from the drop-down list.
7. Click Mark.
8. Click the graphics box you are referencing.
9. Type the target name in the Select Target text box or select the target name from the drop-down list.
10. Click Mark Target.
11. Click outside the graphics box (to deselect the box).
12. Click Generate, OK.

If you break a cross-reference when you move a graphics box, see "Discombobulated Graphics Box References" in the Troubleshooting section at the end of this chapter.

WORKING WITH MASTER DOCUMENTS AND SUBDOCUMENTS

The Master Document feature is ideally suited for any large project—an employee manual, a college dissertation, or a complex legal contract, for example. Writers often collaborate on a large project and then combine their work into one document. Without WordPerfect's Master Document feature, combining separate efforts is a time-consuming task that presents many challenges in numbering pages, creating a table of contents, setting up headers and footers, and generating cross-references.

Here's how it works: You create a document with links to other files. This is the master document. A subdocument is one of the linked files. When you expand the master document, each of the subdocuments is opened into the master document, which results in one huge document. Now you can work on all the text as a whole. You can search through the entire work, generate document references, make global formatting changes, and so forth. When you condense the master document, the subdocuments are saved and removed from the master document, leaving only the subdocument codes. For this reason, creating prefatory pages and introductory materials is easy because you don't have to scroll through all the text.

BREAKING UP AN EXISTING DOCUMENT INTO SUBDOCUMENTS

Breaking up an existing document into subdocuments is simple—just select a section and save it to a file. You can divide the document into as many logical or manageable sections as you want. If necessary, you can create subdocuments within subdocuments. Subdocuments can be expanded independently, so you have complete control over how much of a document you work with at a time.

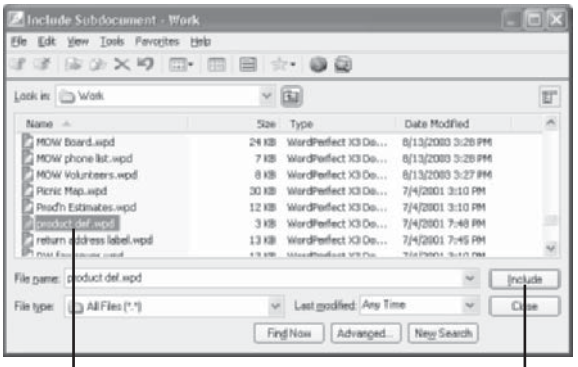
To create subdocuments from an existing document, select the section of text that you want to save in a subdocument. Keep in mind that you might someday use this subdocument in other master documents. With the text selected, click the Save button. In the Save dialog box (see Figure 15.16), choose Selected Text, and then click OK to display the Save File dialog box. Type a name for the new file, and then choose Save.

Figure 15.16
If you click the Save button with text selected, you can choose between saving the entire file or just the selected text.

CREATING A MASTER DOCUMENT

A master document is just a regular WordPerfect document, with text and formatting codes. What turns a regular document into a master document is the links to other documents—the subdocuments. There isn't anything special about a subdocument—it's a regular WordPerfect document, too, with text and formatting codes.

You might already have a master document shell, especially if you just finished saving sections of text into files (as described previously) so they can be subdocuments. If you haven't done this, go ahead and type whatever headings or introductory material you need before the text of the first subdocument. Click where you want to insert the subdocument text, and then choose File, Document, Subdocument. The Include Subdocument dialog box appears (see Figure 15.17). Select the subdocument file, and then click Include.

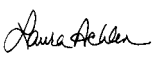


Select a file in the list

Click to insert the subdocument code

Figure 15.17
Include Subdocument is one of the many different file management dialog boxes in WordPerfect.

TIP FROM



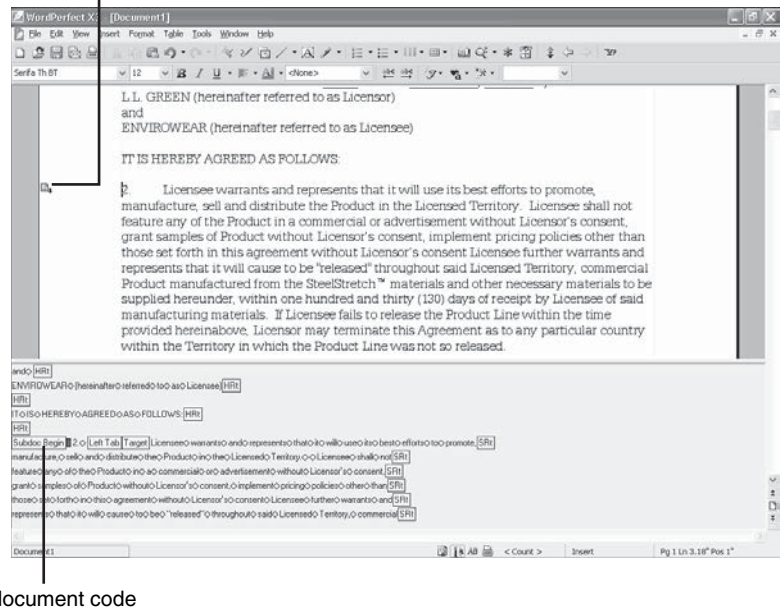
The Reference toolbar includes three buttons for working with master and subdocuments: Subdocument, Expand Master, and Condense Master. Right-click the toolbar, choose More, and then choose Reference. Choose Close to clear the Customize Settings dialog box.

What happens next depends on your view mode. If you're in Page view, you have to scroll over to the left to see the subdocument icon in the margin (see Figure 15.18). If you're in Draft view, the name and path of the subdocument are displayed in a comment (see Figure 15.19).

CAUTION

If you don't see the name and path of the subdocument in Draft view, choose Tools, Settings, Display, Document. Enable the check box for Margin Icons, choose OK, and then Close.

Subdocument icon



Subdocument code

Figure 15.18
In Page view, the position of a subdocument code is marked by icons in the left margin.

Subdocument comment

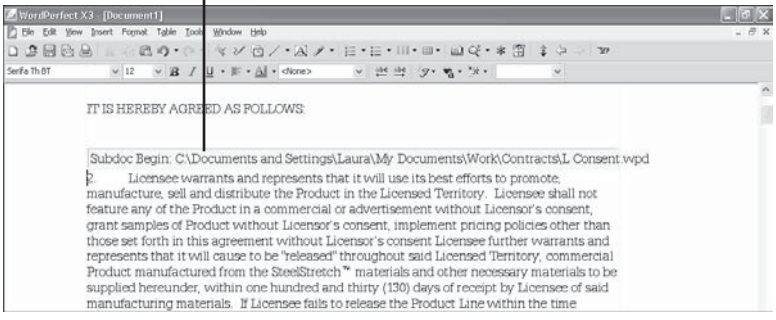


Figure 15.19
In Draft view, a subdocument is displayed as a comment.

NOTE

Subdocuments can easily be rearranged in a condensed master document. Turn on Reveal Codes and select the [Subdoc] code. Press Ctrl+X to cut the code. Click where you want to insert the subdocument code, and then press Ctrl+V to paste the code.

It's a little more complicated to rearrange expanded subdocuments, but it can be done. Turn on Reveal Codes and make sure you include the [Subdoc Begin] and the [Subdoc End] codes when you select the text of the subdocument. Press Ctrl+X, click where you want to insert the subdocument text, and then press Ctrl+V.

If you can't see the filename in the Subdocument code, see "I Can't See the Filename in the Subdocument Code" in the Troubleshooting section at the end of this chapter.

EXPANDING AND CONDENSING MASTER DOCUMENTS

When you expand a master document, each subdocument is inserted into that master document. You can then work with all the text at once. You can do a global search and replace, mark the text for an index or a table of contents, apply styles, and proof for whitespace and consistent formatting; you can perform any task that involves working with the entire document.

To expand a master document, choose File, Document, Expand Master. The Expand Master Document dialog box opens, with a list of the subdocuments (see Figure 15.20).

Figure 15.20
You can select the subdocuments you want to expand in the Expand Master Document dialog box.

Click to mark all or clear all check boxes

A subdocument that has a check mark in its check box will be opened and inserted in the master document. If you remove a check mark, that subdocument won't be opened. So, you can expand only the subdocuments that you want to work with. Click OK to expand the subdocuments.

TIP FROM

If you have a long list of subdocuments and you want to expand only one or two of them, it's quicker to deselect them all, and then select the one or two that you want. To deselect all the subdocuments at once, choose Mark/Clear, Clear All. When you're ready to expand all the subdocuments, you can reselect them. Choose Mark/Clear, Mark All to mark them all at once.

CAUTION

If one of the subdocuments has been moved or deleted, you get an error message. You can either type a new path and filename or browse for the file. If you're not sure where the file is, choose Skip. Network users should make sure they are mapped to the drive where the subdocuments are stored.

NOTE

There are three different subdocument margin icons. The one with the down arrow is the [Subdoc Begin] code, the one with the up arrow is the [Subdoc End] code, and the one with the arrow tilting down to the left is a condensed subdocument [Subdoc path/filename] code.

When you condense a master document, you get to select which subdocuments are condensed and which are saved. By selectively condensing certain subdocuments, you can work on related sections of a document without "wading through" the rest of the text. Even a huge 500-page legal brief can be easily revised by breaking it up into subdocuments, and then expanding and condensing only those sections that you want to work with.

To condense a master document, choose File, Document, Condense Master. The Condense/Save Subdocuments dialog box appears (see Figure 15.21).

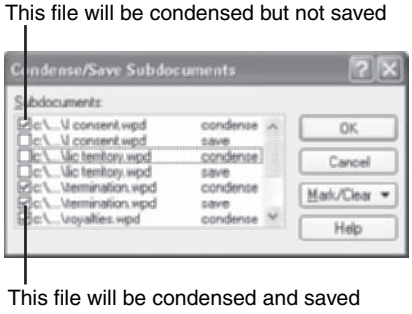


Figure 15.21
In the Condense/Save Subdocuments dialog box, you can place a check mark next to a file to save or condense it.

Once again, the Mark/Clear button opens a drop-down menu of options that you can use to condense all or clear all and to save all or clear all. Otherwise, you can place a check mark next to the files that you want to condense and save.

CAUTION

Think carefully before you choose to save your changes to a subdocument, especially if the subdocument belongs to a colleague. To save your changes without overwriting the original file, move or copy the original file before you condense and save the subdocument. Currently, there is no provision for saving a subdocument under a different name.

TIP FROM

You should always condense a master document before you save it. Otherwise, you save the same information twice and consume twice the disk space. Remember, you've already saved the subdocuments, so you don't need to save that same information in the master document.

If you have some stray subdocument text that won't disappear, or if the filename is missing in the Condense/Save Subdocuments dialog box, see "I Accidentally Deleted a Subdocument Code" in the Troubleshooting section at the end of this chapter.

GENERATING DOCUMENT REFERENCES IN MASTER DOCUMENTS

When you generate document references for a master document, WordPerfect automatically expands the master document, generates the document references, and then condenses the master document again. If this procedure modifies any subdocuments, by default

WordPerfect saves the modified subdocuments over the originals. If you don't want changes saved to the subdocuments, you can deselect the option to save subdocuments in the Generate dialog box (refer to Figure 15.14).

➔ For information on creating a table of contents, **see** "Creating a Table of Contents," **p. 423**.
➔ For the steps to create an index, **see** "Creating Indexes," **p. 434**.
➔ To learn how to create a table of authorities, **see** "Creating a Table of Authorities or a Bibliography," **p. 428**.
➔ To learn how to create a list in a long document, **see** "Assembling Lists," **p. 440**.

Formatting Subdocuments and Master Documents

The key to working with master documents and subdocuments is learning how to create subdocuments that can function independently of the master document. The formatting codes that are necessary in a subdocument can cause problems in the master document, and vice versa.

Automatic Code Placement (the behind-the-scenes WordPerfect feature that positions certain codes for you) is a great timesaver. It eliminates a lot of frustration from not positioning the insertion point correctly when formatting (those of us who worked in versions of WordPerfect before the advent of Automatic Code Placement thought it was sheer magic).

However, in the case of subdocuments, the Auto Line Formatter component of the Automatic Code Placement feature can strip out redundant codes, resulting in a subdocument that can no longer stand on its own. For example, let's say you have a double-spaced master document. When you expand a subdocument with a double-spacing code in it, the Auto Line Formatter strips out that code, because it's redundant. When you save the subdocument, it is saved without the double-spacing code so it is saved as a single-spaced document.

Now you're thinking, "Yeah yeah yeah, but what can I do about it?" You can place your formatting codes in an open style at the top of the subdocument…that's what. As long as the "redundant" codes are stored in the DocumentStyle of the subdocument, they can't be deleted by the Auto Line Formatter.

Here are some other things to consider as you format master documents and subdocuments:

- If you want each subdocument to start on a new page, you can either insert a hard page between each subdocument code in the master document, or you can insert a hard page at the top of each subdocument.
- Formatting codes in a subdocument can cause conflicts with codes in the master document. For example, if the master document has Header A defined, that header remains in effect only until another Header A code is reached. If the first subdocument has a Header A defined, that header replaces the header you defined in the master document. This can work to your advantage, however, if you want new header text at the beginning of each chapter or section.

- Styles in a master document override subdocument styles with the same name, so the subdocuments are reformatted according to the codes in the master document's styles. These same-name styles are saved with the subdocument, although styles with unique names are added to the master document's list of styles. Consider creating a template that contains the styles for your project, and then distributing the template among your colleagues so that they can use the styles when they create subdocuments.
- You can mark text for a table of contents, table of authorities, list, index, or cross-reference in both the master document and subdocument. You might find it easier to mark document references in an expanded master document. If you're marking headings for a table, list, or index, you might want to define a style for your headings with all the formatting plus the mark text codes.
- To number an expanded master document sequentially, place a page numbering code to start numbering pages with 1 immediately after the introductory pages (such as the table of contents).
- If you're working on a book, you probably want to increment the chapter numbers in each subdocument. Place a chapter number increment code at the beginning of each subdocument. At the beginning of the master document, insert a page number position code and a chapter number method code.
- If a document is to be printed on both sides of the paper, it's common practice to begin a new chapter or major section on the right side. You can accomplish this by placing a [Force: Odd] code in an open style at the top of each subdocument.
- Don't place footnote or endnote option codes in the subdocuments. These codes, which control spacing between footnotes, separator lines, and whether numbering should restart on each page, should only be placed in the master document.
- In most cases, footnotes should be numbered sequentially throughout a document. However, if you decide to restart the numbering in each subdocument, you need to place a footnote number set code in an open style at the top of each subdocument.
- You can opt to place all endnotes at the end of the document, or at the end of each subdocument. If you opt for the former, place an endnote placement code at the end of the master document and choose Insert Endnotes at Insertion Point in the Endnote Placement dialog box. For the latter, insert an endnote placement code at the end of the subdocument and choose Insert Endnotes at Insertion Point and Restart Numbering in the Endnote Placement dialog box.
- Marking text for cross-references in subdocuments is tricky because you have to remember the target names. Because expanding the master document compiles a list of all the marked targets, you might prefer to mark targets and references in an expanded master document.

Troubleshooting

My Footnote Numbers Keep Going Back to 1

When I insert a footnote on a new page, the numbering starts over at 1.

The Restart Numbering on Each Page option is selected in the Advanced Footnote Options dialog box. To use continuously numbered footnotes for the entire document, choose Insert, Footnote/Endnote, Options, Advanced. In the Advanced Footnote Options dialog box, remove the check mark next to Restart Numbering on Each Page.

I Can't Get Rid of a Reference Number

I just deleted a footnote, but the footnote reference number is still in the paragraph.

The footnote number in the footnote itself and the footnote number in the document are two separate entities. Deleting the text of a footnote and the number in the footnote area doesn't automatically remove the footnote reference number (you have to do it manually). On the other hand, deleting the footnote reference number deletes everything at once.

I Typed the Wrong Target Name

I made a few mistakes when I marked my targets and references. In one case, I've typed the wrong target name. On the next page, I need to move the reference. Can I correct these mistakes without starting over?

If you make a mistake typing the target name, you need to delete the reference code and mark the reference again. If you just need to move the reference, select the explanatory text and the ? (or the reference information, if you've already generated the cross-references). You'll be selecting the text and the reference code, which can also be done in Reveal Codes if you prefer. Press Ctrl+X to cut the code, click where you want to insert the reference code, and then press Ctrl+V to paste the code.

The Generate Button Isn't Available

I've got the Cross-Reference bar displayed, but the Generate button is grayed out. The Generate option on the Reference menu is grayed out as well.

If the insertion point is inside one of the substructure elements (such as a graphics box caption, a footnote, an endnote, a header, or a footer), the Generate option isn't available. Click in the document text. When you move out of the substructure's area, the Generate button becomes available.

Discombobulated Graphics Box References

I just moved a graphics box and now the reference information is incorrect. I've tried generating the document, but the reference is still wrong.

When you click and drag a graphics box to move it somewhere else in the document, the target code doesn't go with it. The two become separated, so the reference information isn't accurate. There are a couple of ways to avoid this.

First, you can turn on Reveal Codes and carefully select both the box code and the target code, and then use Cut and Paste to move the selection.

Or, you can insert the target code in the graphics box caption. Right-click the graphics box, and then choose Caption to display the Box Caption dialog box. Choose Edit. If you like, you can delete the default caption text before you choose Tools, Reference, Cross-Reference. Select the target name from the list, and then choose Mark Target. Choose Close to clear the Reference Tools dialog box; then click the Close button to exit the caption editing window. That's it! Now, no matter where you move this box, the target code stays with it.

I Can't See the Filename in the Subdocument Code

When I turn on Reveal Codes, I can see the folder path to the subdocuments but not the filename. Is there anything I can do to show the filenames in the codes?

Unfortunately, there is a limitation to the number of characters that can be displayed in a code in Reveal Codes. If you have more than 55 characters, including the path and filename, you will only be able to see the first 55 characters. At this point, it isn't possible to increase the number of characters.

Thankfully, there is an easy workaround. If you change the default folder to the folder that your subdocuments are in, the subdocument codes will show only the filename (but not the path).

I Accidentally Deleted a Subdocument Code

I finished revising a master document, so I opened the Condense/Save Subdocuments dialog box to condense the subdocuments. I condensed all the subdocuments, but there is still some text that belongs to a subdocument in my master document. When I look again at the Condense/Save Subdocuments dialog box, I see that the filename for that subdocument is missing. What's happened?

You've accidentally deleted one or both of the beginning or ending subdocument codes. When you do this, the subdocument text becomes a part of the master document. To rectify the situation, select the text and save it (using the original subdocument name). Then, reinsert the subdocument code.

If you are making heavy revisions to a document, you might want to turn on the option to get a confirmation message before deleting codes. Choose Tools, Settings, Environment. Click the Prompts tab, and then select Confirm Deletion of Codes and Stop Insertion Point at Hidden Codes.

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CHAPTER 16

Generating Tables, Indexes, and Lists

In this chapter

by Laura Acklen

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USING DOCUMENT MAP TO NAVIGATE LONG DOCUMENTS

Document Map, a feature that was introduced in WordPerfect 11, is the perfect companion to the table of contents, table of authorities, index, and list features. Though you might not create many tables of contents or indexes, you'll probably review some documents with these elements in them. If you do, you'll love this feature.

Document Map builds a roadmap of your document using table of contents, table of authorities, index, or list markers. You can quickly navigate through the document by clicking a reference marker in the document map.

To display the document map:

1. Open a document that contains markers for either a table of contents, table of authorities, or an index.
2. Choose View, Document Map (Alt+Shift+M) to display the document map. You can click a marker in the list to jump to that text in the document (see Figure 16.1).

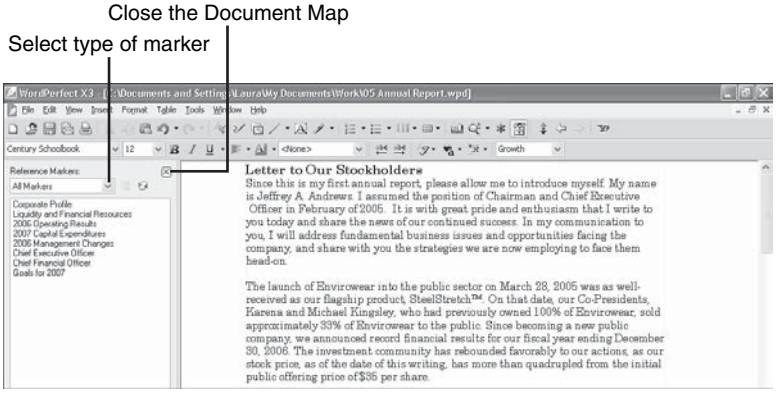


Figure 16.1
The Document Map offers a convenient method to navigate through a lengthy document.

3. If necessary, choose a marker type from the Reference Markers list box to display only specific entries.
4. If you prefer a tree view, click the Turn on Tree View button. This view shows the reference markers in a hierarchal structure so it's easier to see headings and subheadings. Note that the Tree View button is not available if "All Markers" is selected in the Reference Markers drop-down list.
5. If you make any changes to the reference markers, click the Refresh the Document Map button to update the document map.

If you get the error message "This document does not contain the necessary code to create a document map" when you try to open a file in WordPerfect, see "Document Map Error Message" in the Troubleshooting section at the end of this chapter.

CREATING A TABLE OF CONTENTS

Continuing in the fine tradition of providing powerful, yet easy-to-use large document tools, WordPerfect supports a five-level table of contents. Although any text that you mark in the document can be added to a table of contents, the most common entries are chapter names and section headings.

You can automate the process of marking headings for a table of contents by using WordPerfect's heading styles, or by adding the mark text codes to your own heading styles. (I'll get back to that later in this section.)

Creating a table of contents entry is simple: You select the text that you want to appear (in most cases, a heading), and then choose the appropriate table of contents level. WordPerfect surrounds the selected text with Mark Text codes. When you generate the table, WordPerfect grabs the text between the Mark Text codes, positions it in the correct table of contents level, and inserts a current page number next to it.

MARKING TEXT

Selecting text for a table of contents can be a little tricky. You have to make sure that you don't include formatting codes, such as bold or italic, within the Mark Text codes. Otherwise, those codes affect the format of that entry and can potentially cause problems with other entries. If you do get some codes by accident, you'll know right away because, after you generate the table, you'll be able to see that certain entries are formatted differently.

To select text for a table of contents entry, follow these steps:

1. Choose Tools, Reference, Table of Contents to display the Table of Contents tab of the Reference Tools dialog box (see Figure 16.2).
2. Turn on Reveal Codes (press Alt+F3) and select the text that you want included in the table. Start selecting at the first letter of text and stop at the last letter so you don't accidentally include a formatting code.
3. Click one of the Mark buttons (refer to Figure 16.2) to mark this selection for a particular level in the table. For example, click Mark 1 to mark this entry for the first level in the table. Each table of contents level is indented by one more tab stop, so the second, third, fourth, and fifth levels are really sublevels of Level 1.

TIP FROM

If you want an automatic paragraph number to be included with a table of contents entry, make sure you include paragraph numbering codes when you select the text. If you don't want the paragraph numbers to appear in the table, start selecting right after the paragraph number (but don't include the tab or indent code that follows the paragraph number).

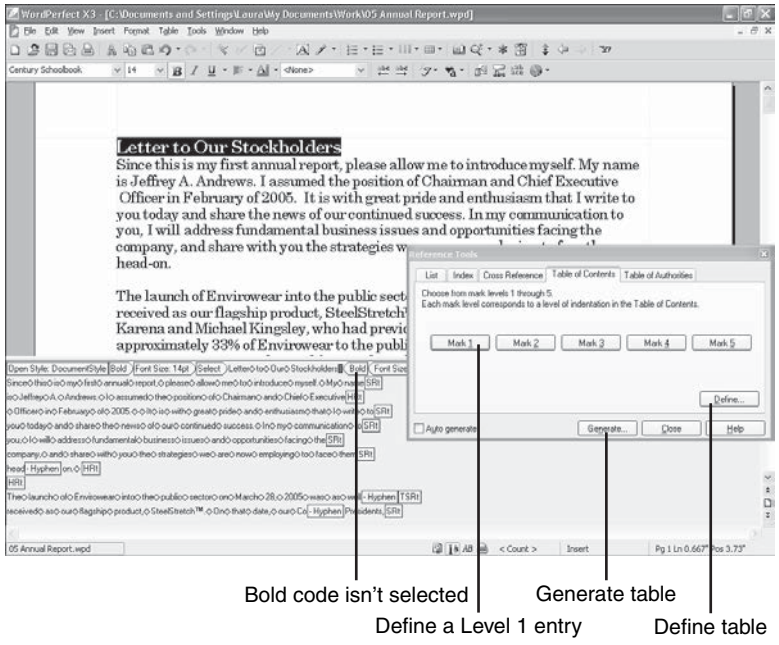


Figure 16.2
The Table of Contents tab of the Reference Tools dialog box has buttons for each level in a table of contents, so marking a selection can be done with one click.

TIP FROM

The Define Table of Contents dialog box is actually a floating palette that can be docked at the top or the bottom of the screen, making it easier to see and work with the text you're marking. Drag the title bar of the dialog box toward the top or bottom of the screen until you see a thick line that stretches from the left to the right side of your screen. Release the mouse button to dock it. To undock it, click at the top of the dialog box and drag it toward the center of the screen.

WordPerfect inserts a mark text code [Mrk Txt T.O.C.] on each side of the selection. To expand the code so you can see the level for the entry, click the code in Reveal Codes. When you're finished marking text, you're ready to define where the table should be placed and how the entries should appear.

USING HEADING STYLES TO MARK TEXT

WordPerfect's heading styles (Heading 1, Heading 2, Heading 3, and so on) include codes that mark the text for a table of contents. There are five heading styles, just as there are five levels in a table of contents. If you use these heading styles for your headings, you don't have to mark the text for the table of contents. All you have to do is define the table and generate it.

In many cases, the outline styles are used to create headings. You can create custom outline styles with table of contents codes so that headings created with the styles are automatically marked for a table of contents.

Relax—it isn't as hard as it sounds. When you create the new style, it contains all the codes of the existing style so you don't have to worry about getting the right codes in place.

To create a customized outline style:

1. Choose Insert, Outline/Bullets & Numbering.
2. Select the outline style that you used in the document, and then choose Edit.
3. Select the level that you want to edit in the list, and then click Create Style.
4. Type a name for this new style you are creating in the Style Name text box.
5. If necessary, place a check mark in the Show 'Off Codes' check box.
6. Click right before the Codes to the Left Are ON—Codes to the Right Are OFF code. Hold down the Shift key, and then press the right arrow to move past the Off code.
7. From the Styles Editor menu choose Tools, Reference, Table of Contents to display the Table of Contents tab of the Reference Tools dialog.
8. Click a Mark button to mark the heading text for a particular level in the table.
9. Choose OK to close the Reference Tools dialog box. One [Mrk Txt T.O.C.] code is inserted in the On side and another on the Off side.
10. If necessary, repeat steps 3–9 for other outline levels.

➔ For more information on editing styles, **see** "Editing Styles," **p. 236**.

DEFINING TABLES

You can define a table of contents whenever you like—before or after you've marked the entries. Defining the table is a two-part process. First, you create a page for the table, which in most cases is at the top of the document. Second, you define how you want the table of contents to look. You choose the number of levels and the position and format of the page number that goes along with each entry. You can also make global changes to the way table of contents entries are formatted by editing the five table of contents styles (one for each level).

Follow these steps to define a table of contents:

1. If necessary, create a new page and type a title for the table of contents.
2. Click on the line where you want the first entry to appear (usually 2–3 lines down from the title).
3. If the Table of Contents tab of the Reference Tools dialog box is displayed, click Define. Otherwise, choose Tools, Reference, Table of Contents to display the dialog box, and then click Define. The Define Table of Contents dialog box appears (see Figure 16.3) .
4. Type the number, or click the spinner arrows to set the Number of Levels (1–5).
5. Click the drop-down arrow for each available level and choose a page number position. (Depending on what you choose in step 4, some of the levels might not be available.)

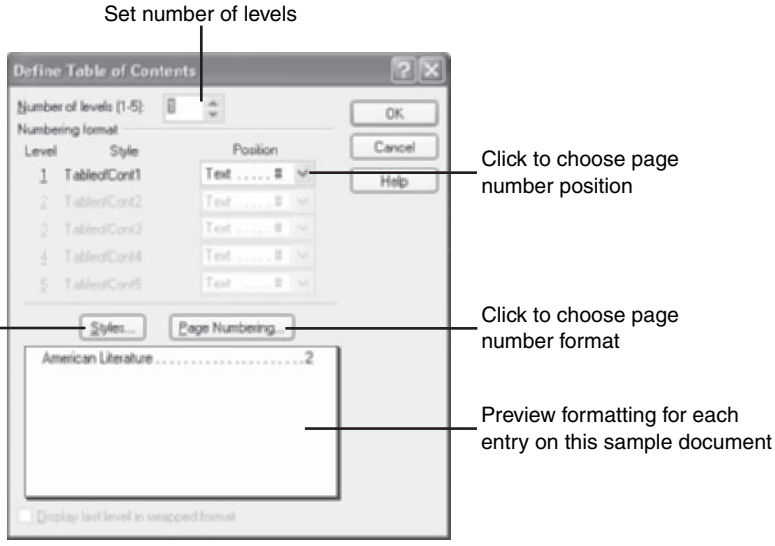


Figure 16.3
In the Define Table of Contents dialog box, you can choose the number of levels for the table, and then select how you want the page numbers to appear.

6. Click Page Numbering to open the Page Number Format dialog box (see Figure 16.4). Select the document's page number format, or create a custom page number format, and then click OK.

➔ For a complete discussion of creating customized page number formats, **see** "Switching to a Different Page-Numbering Scheme," **p. 198**.

Figure 16.4
In the Page Number Format dialog box, you can create a custom page number with page, chapter, and volume numbers.

7. To edit the table of contents styles, click Styles. Select one of the TableofCont styles, and then click Edit. Click OK to return to the Define Table of Contents dialog box when you are finished making your changes.

➔ For more information on editing styles, **see** "Editing Styles," **p. 236**.

8. Click OK. WordPerfect inserts the text <<Table of Contents will generate here>>.

Now you've defined the table of contents so that when you generate the table, the table of contents entries have a place to go. You're almost done. Now you need to do two more things:

- So that the first page of text following the table of contents starts on a new page, it might be necessary to insert a hard page at the end of the table of contents.
- Reset page numbering to 1 if you don't want the table of contents pages included in the page count. Also, if you've formatted the table of contents page numbers in Roman numerals, you might want to switch to Arabic numerals for the body text.

GENERATING TABLES

When you generate a document, WordPerfect compiles all the document references and creates tables, lists, and indexes. Generating a document takes a lot of processing power, so before you begin, save the document. Better safe than sorry, I always say.

When you generate a document, all the document references (that is, the table of contents, the table of authorities, the index, lists, and cross-references) are generated at once. When you regenerate a document, the old tables, lists, and indexes are deleted from the document and rebuilt. This way, any entries that you've deleted are removed.

To generate a document, click the Generate button in the Reference Tools dialog box, or choose Tools, Reference, Generate. Or, you can press Ctrl+F9. The Generate dialog box appears (see Figure 16.5).

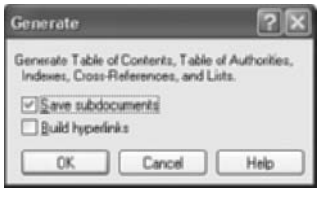


Figure 16.5
When you generate a document, all the document references are updated at once.

NOTE

If the Save Subdocuments check box is enabled, the Generate feature updates the document references in subdocuments. This can be extremely time-consuming because WordPerfect must open each subdocument, generate the references, and then save the subdocument. If you have links to subdocuments in this document, and you don't want to generate them, deselect Save Subdocuments in the Generate dialog box.

Click OK to generate the table of contents. Figure 16.6 shows a sample table of contents.

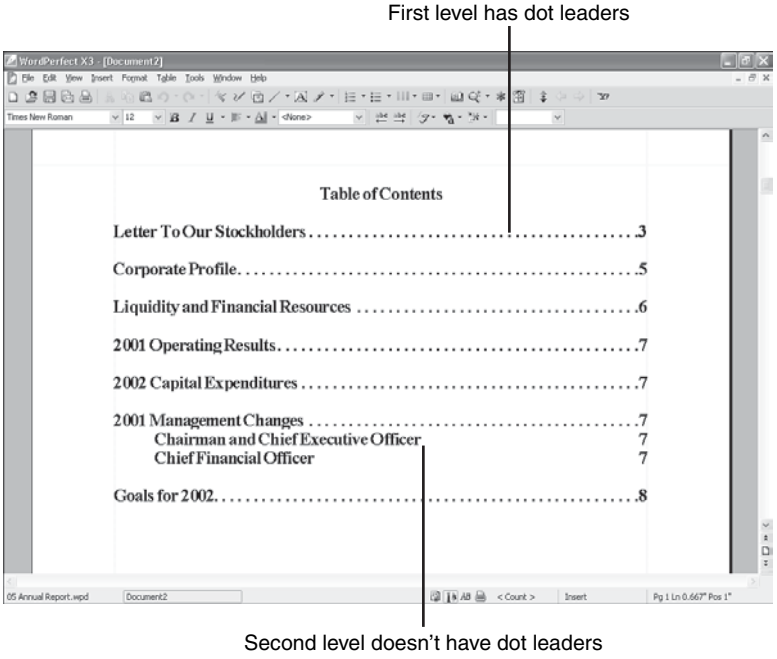


Figure 16.6
This table of contents has two levels, with no dot leaders for the second level.

TIP FROM

> You can edit table of contents entries after you've marked them. Simply revise the text between the two [Mrk Txt T.O.C.] codes and then regenerate the table. Just make sure you don't accidentally delete one of the [Mrk Txt T.O.C.] codes.

If some of your table of contents headings didn't make it into the table of contents, see "The Table of Contents Is Missing Entries" in the Troubleshooting section at the end of this chapter.

If some of the entries in the table of contents are bold or italic and others are not, see "Several Table of Contents Entries Are Bold" in the Troubleshooting section at the end of this chapter.

CREATING A TABLE OF AUTHORITIES OR A BIBLIOGRAPHY

A table of authorities is like a table of contents for a legal document. It lists the authorities, which are the legal references to other cases, statutes, rules, citations, regulations, amendments, and so on, that appear in the brief. You can also use the Table of Authorities feature to create a bibliography for any document that requires the identification of sources so this feature can be used in many other areas, not just the legal field.

A table of authorities (or bibliography) can be divided into sections to separate the different sources. For example, a typical table of authorities might be divided into sections for cases, statutes, and regulations. A bibliography might have sections for newspaper articles, journal articles, and books.

Before you start marking text in a document, sketch out a rough draft of the table of authorities (or bibliography) so you have an idea of how many sections you need and what they will be called. You'll need to specify a section when you mark an entry. (This is similar to marking a table of contents entry for a particular level.)

MARKING THE FIRST AUTHORITY

The first time you mark an entry for inclusion in a table of authorities, you define the actual text to be included in the table, so it's called marking the "full form." As usual, when you're ready to mark the entries, you should turn on Reveal Codes (press Alt+F3) so you can see exactly what you are selecting. You can mark text for a table of authorities in the body text, as well as in footnotes, endnotes, and graphics box captions.

Follow these steps to mark an entry as a full form:

1. With Reveal Codes on, select the text that you want to appear in the table of authorities. Take note of nearby formatting codes—you may or may not want to include them in the selection.
2. Choose Tools, Reference, Table of Authorities to display the Table of Authorities tab of the Reference Tools dialog box (see Figure 16.7).

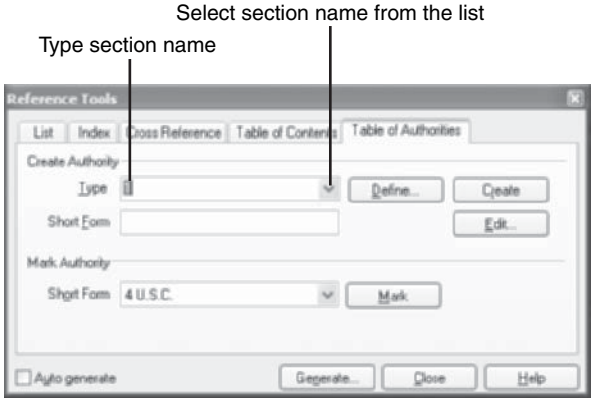


Figure 16.7
The Table of Authorities feature bar has buttons that really speed up the tedious process of marking entries.

3. Type the name of the section in the Type text box, or click the Type drop-down list arrow and choose an existing name from the list.
4. Click in the Short Form text box and edit the portion of the selected text or just type a one- or two-word abbreviation. The short form is the unique identifier that ties together the first authority and the following occurrences.

NOTE

> The short form name must be unique, but it should also be descriptive enough so that you can easily associate the short form name with the full form.

5. Click Create. The Table of Authorities Full Form editing window appears, with the text that you selected at the top of the window (see Figure 16.8).

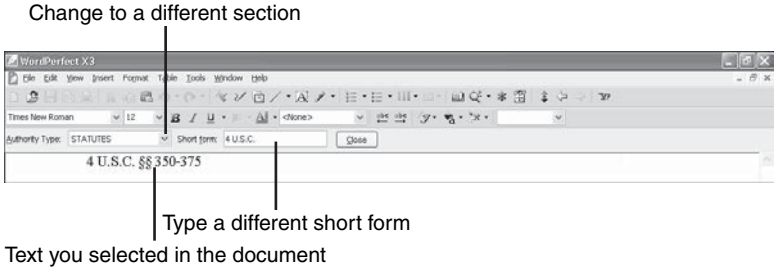


Figure 16.8
You can freely edit an entry so that it appears exactly as you want it to in the table.

NOTE

> One of the advantages that the Table of Authorities feature has over the Table of Contents feature is the capability to edit the table entry separately from the text entry. In fact, the table entry can look completely different from the text entry because you can freely add font attributes, indentation, and blank lines–whatever you think is necessary to make the entry in the table of authorities easier to read.

6. Edit the text so that it looks exactly the way you want it to appear in the finished table. You can add or remove font attributes, indent text, add hard returns, and so on.

➔ If you need a quick peek at the steps for indenting text, **see** "Indenting Text," **p. 176**.
➔ If you want to use font attributes, **see** "Emphasizing Important Text," **p. 64**.

7. When you are finished, click Close. WordPerfect inserts a [ToA] code in the document.

TIP FROM

> If you move the insertion point to the left of the code, the code expands to show you the full details: [ToA: section name; short form text; Full Form]. The Full Form part of the code identifies it as a full form code (as opposed to a short form code, which is explained in the next section).

If you later edit a table of authorities entry, the text in the full form won't be modified. You must edit the full form to update the entry for the table. To edit a full form, choose Tools, Reference, Table of Authorities, select the related short form in the "Mark Authorities" section, and then choose Edit. You can also turn on Reveal Codes and double-click Table of Authorities code (either the full form or short form).

When the Edit Full Form dialog box appears (see Figure 16.9), select the full form in the list, and then click OK. This is a little confusing, so stick with me here—the full form is identified by its short form name in the Edit Full Form dialog box.

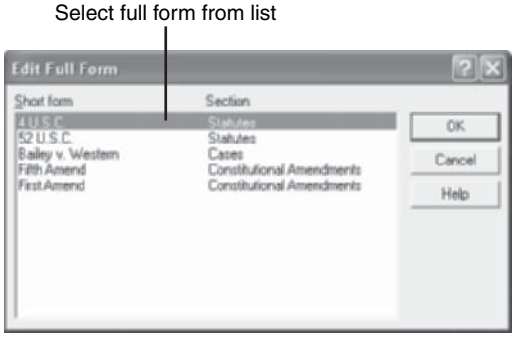


Figure 16.9
If you revise the text of a table of authorities entry in the document, you need to make those same revisions to the full form.

When you're in the table of authorities full form editing window (refer to Figure 16.8), you can revise the text, choose another section, or assign a different short form name.

MARKING SUBSEQUENT AUTHORITIES

After you've finished marking the full form, you can go through the document and mark subsequent occurrences with the short form. This step is the quickest because you don't have to select the text—you simply click in the text and choose the short form from a list.

Follow these steps to mark an authority by using the short form:

1. Click in the authority/text.
2. Click the Short form drop-down list arrow and then select the short form in the list. If the short form is already displayed, you can skip this step.
3. Click Mark. WordPerfect inserts an abbreviated code in the document: [ToA:,short form text;].

TIP FROM

The last short form name you used is displayed in the Short form list box, so it's easy to continue marking subsequent occurrences of an authority. Simply click in the authority, and then click Mark. You might also consider using the Find feature in tandem with the Table of Authorities feature bar to quickly search for and mark all subsequent occurrences of each authority. You can have both dialog boxes open at the same time and it's a great way to navigate through a lengthy brief.

➔ To get more information on searching for text, **see** "Searching for Text by Using Find and Replace," **p. 126**.

If the list of short forms is getting cluttered with short forms that you don't use anymore, see "Obsolete Short Forms" in the Troubleshooting section at the end of this chapter.

DEFINING AND GENERATING TABLES

Just as you did for a table of contents, you have to create a page for the table of authorities (or bibliography) entries. You probably want the entries on a page by themselves, with headings for each section. You can create this page before or after you mark the authorities. When you have defined each section, you're ready to generate the table.

Follow these steps to define a table of authorities:

1. If necessary, press Ctrl+Enter to create a new page for the table.
2. If you want to set a page number format for the table of authorities pages, choose Format, Page, Numbering.

➔ If you really want to get fancy with the page numbers, **see** "Adding Page Numbers," **p. 195**.

3. Click where you want a section of the table to appear.
4. Type a heading for the section, and then press Enter a few times to insert some space between the heading and the entries.
5. Click the Define button on the Table of Authorities feature bar. (If the feature bar isn't displayed right now, choose Tools, Reference, Table of Authorities.) The Define Table of Authorities dialog box appears (see Figure 16.10). The section names that have been used in this document are listed next to the default numbering scheme, which is dot leaders trailing out to the page number at the right margin.

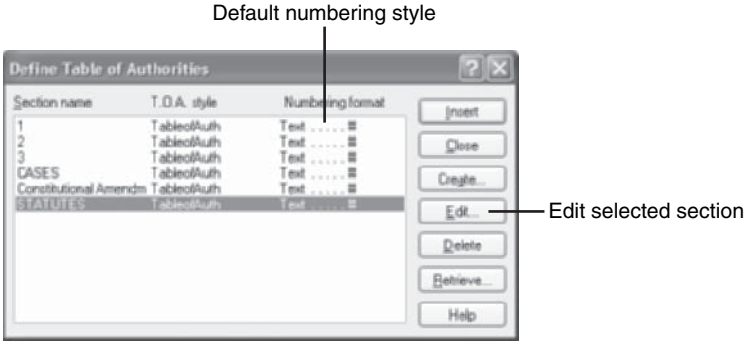


Figure 16.10
In the Define Table of Authorities dialog box, choose the section of authorities that you want to insert.

6. Click the section name, and then click Insert. WordPerfect inserts the following text at the insertion point: <<Table of Authorities will generate here>>.
7. Repeat steps 3–6 to define the location of each remaining section.

If the next page is the beginning of the body text, make sure you reset the page numbers back to 1 at the top of that page so that the table of authorities pages don't throw off the document page numbers.

TIP FROM

Laura Acklen

Consistency across documents is important. When you have figured out how you want to do something, such as defining a table of authorities, you can save time by retrieving that information from another document. To retrieve a table of authorities definition from another file, click the Retrieve button in the Define Table of Authorities dialog box to open the Retrieve ToA Definitions dialog box. Type the name of the file in the Filename text box, or click the Files icon to browse for it. When you've selected the file, the definitions for that document are displayed in the Name list box. Choose the definition, and then click OK to add them into the Define Table of Authorities dialog box.

CUSTOMIZING THE TABLE OF AUTHORITIES

By now you're hooked on the capability to customize virtually every aspect of the WordPerfect program, and you wouldn't even consider using another product that offered less flexibility. So, when you define a table of authorities, you expect to have the capability to customize the format of each of its sections. And you do—you can even edit the table of authorities style and then change the defaults for all future tables.

To customize the format of a particular section, select the section in the Define Table of Authorities dialog box (refer to Figure 16.10). Click Edit to open the Edit Table of Authorities dialog box (see Figure 16.11).

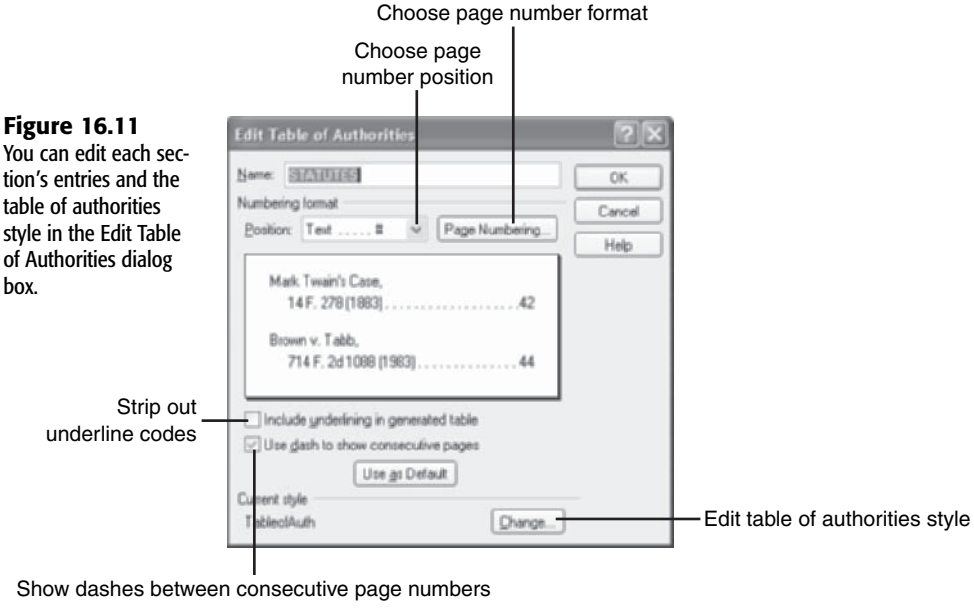


Figure 16.11
You can edit each section's entries and the table of authorities style in the Edit Table of Authorities dialog box.

After you've marked all the entries, defined the location for each section's entries, and made the necessary adjustments in the Edit Table of Authorities dialog box, you're ready to generate the table. If the Table of Authorities tab of the Reference Tools dialog box is displayed, click the Generate button. Otherwise, choose Tools, Reference, Generate (or press Ctrl+F9). Choose to save changes to subdocuments or to build hyperlinks, and then click OK to build the table.

CAUTION

> If you've accidentally typed a short form name incorrectly, or if you have short forms that don't have corresponding full forms, you'll get an error message when you generate the table. The problem entry will be preceded by an asterisk in the first section of the table so you can see which entries need repair. If the incorrect short form name has been used, simply delete the short form code and reinsert it. If the full form is missing, find the first occurrence of the authority, delete the full form, and then create a new full form.

WordPerfect searches through the document for each entry and inserts the page number(s) where the entry is found (see Figure 16.12) .

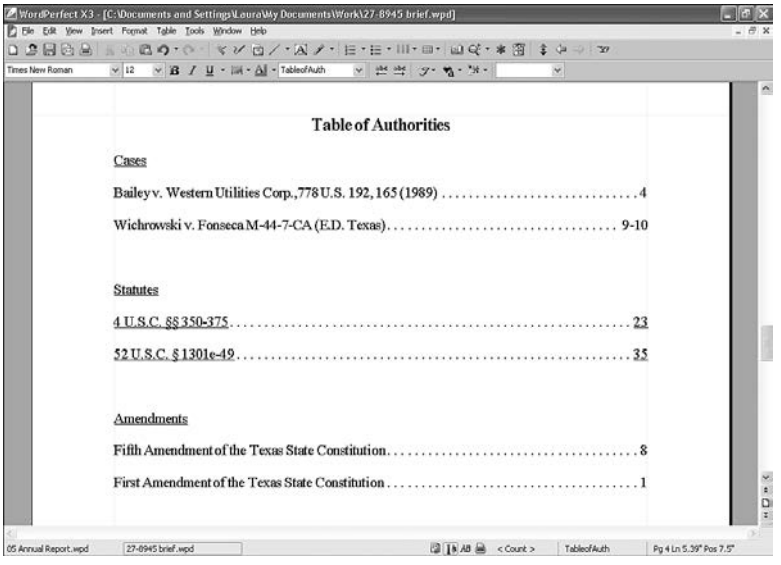


Figure 16.12
This is an example of a table of authorities in a legal brief.

CREATING INDEXES

Take a look at the index at the back of this book and ask yourself, "Would I want to create one of these by hand?" Probably not, unless you're a wonderfully patient individual who can tolerate a very tedious task. I'm not, so I use WordPerfect's Index feature to help me create indexes for my lengthy documents.

There are two methods to create an index; the one you use depends on how much time you have, and how much control you want over the process. If you mark the entries by hand, you have maximum control, but you might need to spend a lot of time doing it. Or, you can create a concordance file with a list of index information and let WordPerfect compile the index for you; this is fastest, but you have minimal control. For the best of both worlds, you can use a combination of both methods.

CREATING CONCORDANCE FILES

A concordance file is a list of words or phrases that you want included in the index. When you generate the index, WordPerfect compares the entries in the concordance file with the text and, if a match is found, inserts the index entry with a page number. The advantage of creating a concordance file is that it's much faster than selecting and marking every index entry manually. The disadvantage is that you lose some flexibility.

To create a concordance file, start with a blank document, and then type the index entries. Type only one entry per line, and make sure you press Enter at the end of the last line. Click the Save button, and then give the concordance file a name. You'll be prompted for the name and location later, when you generate the index.

CAUTION

Concordance file entries are not case-sensitive, so if you type "Recycling," the words "recycling" and "RECYCLING" are considered matches. However, when the index is created, WordPerfect uses the capitalization in the concordance file, not the capitalization in the document. This is important because when you create the concordance file, you need to make sure that you use the capitalization that you want to see in the index.

TIP FROM

You have a pretty good memory if you can remember all the entries you want in the index! I developed a system where I add entries to the concordance file while I'm working on a document. I keep both documents open and switch back and forth between the two.

TIP FROM

It is usually easiest to work with the concordance file if it's in alphabetical order. In just a few seconds, you can sort the entries alphabetically. At the top of the file, choose Tools, Sort. Select First Word in the Line, and then choose Sort. As you add entries, you can repeat this process to keep the list in alphabetical order.

In WordPerfect X3, there is a macro that helps you create a concordance file. Choose Tools, Reference, Index, Define to open the the Define Index dialog box. You'll see a Create button. When you click this button, the Concord macro plays. You'll see a Concordance File dialog box where you can choose what you want included or excluded in the concordance

file. After you make your selections, the macro will create an alphabetized list of every unique word in the document. Think about that for a minute—every single word that you used in the document will appear in the list. Unless you want every word you used in the document included in the finished index, you'll need to edit the concordance list. When the macro is finished, you'll be able to open the concordance list and remove the words that you don't want to appear in the index. Save the concordance list so you can specify the filename (or browse for it) in the Define Index dialog box.

WordPerfect automatically marks each entry in the concordance file as a heading—you don't have to do a thing. However, if you want an entry to be listed as a subheading in the index, you have to mark that entry manually. See the next section for the steps to mark an index entry.

MARKING INDEX ENTRIES BY HAND

Tedious? Yes. Precise? Absolutely. Marking every index entry in a document is a definite investment of your time and energy. The investment pays off when the reader can easily locate the information that you've painstakingly compiled together.

Marking index entries is simple—you select the text, and then click one of the buttons in the Reference Tools dialog box to mark the text for the index. Indexes have two levels, so you can mark an entry as a heading or as a subheading (underneath a heading).

Every instance of an index entry has to be marked. Otherwise, the list of page numbers next to the entry won't be complete. After you mark the first occurrence, use the Find feature to locate the other occurrences in the document, and then move on to the next index entry.

To mark text for an index, follow these steps:

1. Choose Tools, Reference, Index. The Index tab of the Reference Tools dialog box appears over the text (see Figure 16.13).

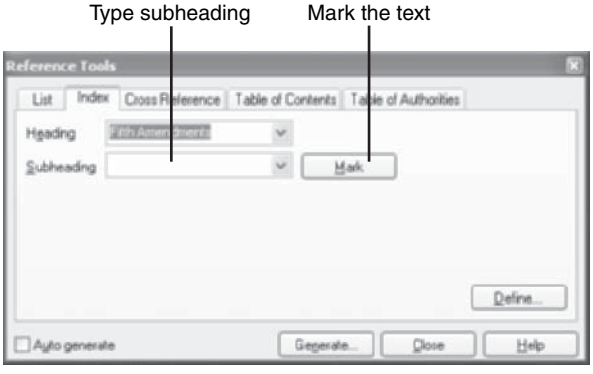


Figure 16.13
The Index tab has buttons to speed up the process of marking the entries and creating the index.

2. Select the text for the entry. (You can be a little sloppy selecting text here because if you accidentally grab an underline or bold code, WordPerfect won't apply the attribute codes to index text.)
3. Click in the Heading text box to mark this entry as a heading; click in the Subheading text box to mark this entry as a subheading. WordPerfect inserts the selected text in the text box.
4. If you are marking this entry as a subheading, type the heading that you want it to fall under in the Heading text box (or select an existing heading from the drop-down list).

TIP FROM

The heading and subheading text don't have to match the text that you selected in the document. You can type exactly what you want to appear in the index heading (and subheading). This is helpful when the text in the document doesn't fit well in the index.

5. Click the Mark button to insert the index code.

The next time you have to mark this entry, you can either select the text and then click in the Heading text box (to insert the selection), or you can select an entry off the Heading and Subheading drop-down lists.

CAUTION

When you revise a document, you're likely to make some changes to index entries. Because these changes aren't automatically reflected in the index codes, you need to delete the old code, and then insert a new one for the revised entry. In Reveal Codes, click and drag the index code out of the Reveal Codes window to delete it. Select the entry, and then mark it as a heading or subheading. The next time you generate the index, the entries will be updated.

DEFINING AND GENERATING INDEXES

Defining an index is similar to defining a table of contents or a table of authorities, except an index is assembled at the end of a document. To set up and create an index page, follow these steps:

1. Move to the end of the document and press Ctrl+Enter to create a new page.
2. At the top of the new page, type a heading for the index.
3. If necessary, choose Tools, Reference, Index to display the Index tab of the Reference Tools dialog box.
4. Click the Define button on the Index tab of the Reference Tools dialog box to display the Define Index dialog box (see Figure 16.14).

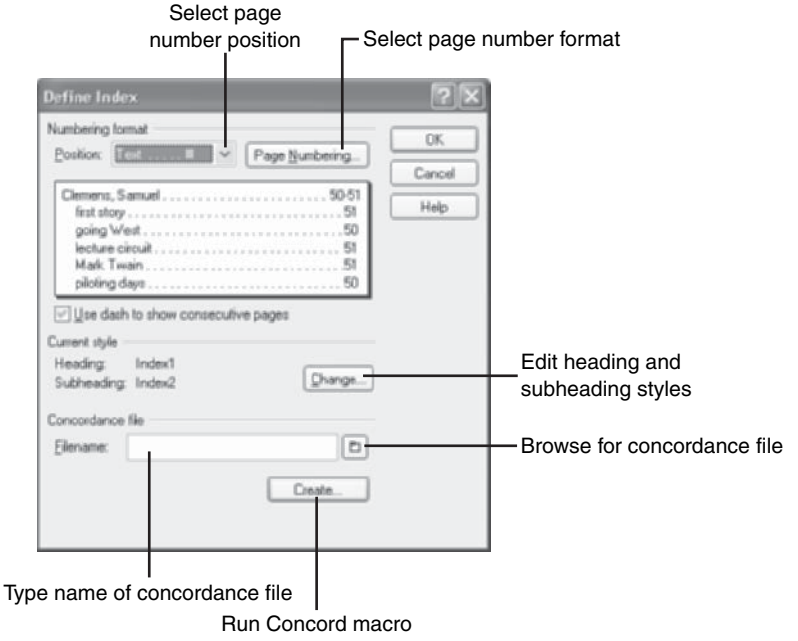
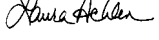


Figure 16.14
You can use the Define Index dialog box to select a page number format and position. You can also edit the heading and subheading styles and specify a concordance file.

5. If you want to use the default settings, you can skip to step 6. Otherwise, make the necessary changes to the following:
   - Click the Position drop-down list arrow and choose a position for the page numbers in the list.
   - Click Page Numbering to use a custom page number format.
   - Click Change if you want to edit the two index styles.
   - Type a filename in the Filename text box or click the File icon to browse for the concordance file.
6. Click OK. The following text is inserted at the insertion point: <<Index will generate here>>. An Index definition code is also inserted.
7. Click Generate. Choose to save changes to subdocuments or to build hyperlinks, and then click OK to build the index. Figure 16.15 shows a sample index.

TIP FROM



Flip back to the index in this book. Notice that the index is formatted into three columns. Have you ever seen an index not formatted in columns? To format your index in columns, see "Defining Columns," in Chapter 8, "Formatting the Page."

When you generated the index, if you received an error message that said one of the concordance file entries was too long, see "A Concordance Entry Is Too Long" in the Troubleshooting section at the end of this chapter.

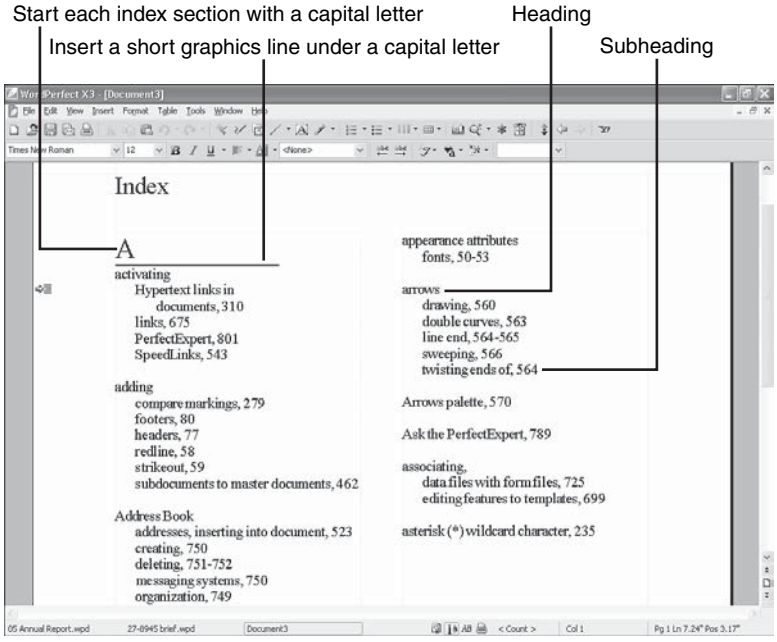


Figure 16.15
This is a sample of an index that might appear in the back of a WordPerfect reference book.

An index has a lot more entries than a table of contents or a table of authorities. The number of errors generally rises in proportion to the number of entries, so indexes tend to be more problematic than tables. After you generate the index, you might have some things to fix:

- **Misspelled entries**—Make a note of the page number for the misspelled entry, move to that page, and then turn on Reveal Codes (by pressing Alt+F3). When you locate the Index code for that entry, click on it or move to the left of it so the code expands and shows you the heading (and subheading) text. If the text is misspelled in the document, go ahead and correct it, but what you really need to focus on is the text in the heading or subheading because that's what shows up in the index. When you find the index code with the misspelled heading or subheading text, click and drag it out of the Reveal Codes window, and then re-create it.
- **Entries with similar spellings**—If you have multiple entries with similar spellings, you need to consolidate them into one entry. For example, if you have an entry for Recycling Initiative and another for Recycling Initiatives, you need to decide which entry you want to keep, and then delete and re-create the index codes for the other entry. Rather than use the Find feature to look for every index code, make a note of the page numbers so you can zero in on a page at a time.
- **Remove outdated entries**—Turn on Reveal Codes (by pressing Alt+F3), locate the index code, and then click and drag it out of the Reveal Codes window.
- **Solitary headings**—If you see a heading that needs a subheading, you can go back and add another index code for a subheading, or you can delete and re-create the original code with heading and subheading text.

- **Scattered subheadings**—If you see subheadings that would make more sense if they were combined into one subheading, you need to re-create the index codes for those subheadings. Make a note of the page numbers, move to the first page, and turn on Reveal Codes (by pressing Alt+F3). Delete the code, and then re-create it with the new subheading. Repeat for the other index entries with inadequate subheadings.
- **Too many subheadings**—A good rule of thumb is to have no more than a dozen subheadings under a heading. Of course, there are exceptions—check out the monster index at the end of this book! You can create a new heading and divide the subheadings between the original heading and the new heading. Of course, this means you have to delete and re-create codes. Decide which subheadings you want grouped under a new heading, and then delete the index codes for that subheading. When you re-create the index codes for those entries, use the new heading.
- **Unexplasined entries**—If you have entries in the index that don't appear in your concordance file, there must be some index codes in the document. You can strip them out with the Find and Replace feature. Choose Edit, Find and Replace. In the Find and Replace dialog box, click in the Find text box, and then choose Match, Codes. Type `i` to jump to the Index code, and then choose Insert & Close. Leave the Replace With text box blank or with <Nothing> in it. Choose Replace All.
- **Misplaced entries**—When you generate an index, subheadings are automatically alphabetized under the heading. If you have subheadings that are out of order, there might be an extra space in front of the heading or subheading text. This can happen when you select text in the document, and then insert it into the Heading or Subheading text box. You know the drill—make a note of the page numbers, turn on Reveal Codes (by pressing Alt+F3), delete the code, and then re-create it.

Assembling Lists

A list is just what it sounds like—it's a list of items in a document. You might want to generate a list of all the figures or illustrations, with the numbers of the pages where they can be found in the document. If you have graphics boxes, you can have WordPerfect automatically place the caption text from each type of graphics box into a separate list. You can create multiple lists to handle all the different elements in your document (such as figures, tables, charts, and equations).

Marking Entries

Assembling a list is just like creating a table or an index—you mark the entries, define the list, and then generate the list. To create a list, you have to mark the text that you want included in it. To mark a table, for example, select the table title or heading for the list (for example, Table 1.3, Continuing Education Classes), not the actual table definition code.

CAUTION

> If you mark a graphics box that doesn't include a caption, an entry is inserted in the list with a page number, but the entry is blank. In other words, you have a dot leader and a page number, but no text. Either create a caption for the figure or mark a title or heading instead.

Follow these steps to mark an entry for a list:

1. Choose Tools, Reference, List to display the List tab of the Reference Tools dialog box (see Figure 16.16).

Figure 16.16
Use the buttons on the List tab to speed up the process of marking entries, defining lists, and generating lists.

2. Turn on Reveal Codes (by pressing Alt+F3) and select the text that you want to appear in the list.

CAUTION

> You can't be sloppy when you're selecting text for a list—any formatting codes that fall between the marked text codes will affect that entry in the list (and possibly all the following entries).

3. If the name of the list is already displayed in the List text box, you can skip to step 4. If this is the first entry you've marked for a list, type the name of the list in the List text box. Otherwise, click the List drop-down list arrow and select the name of the list.
4. Click the Mark button. WordPerfect inserts [Mrk Txt List] codes on each side of the selection.

NOTE

> You can see which list an entry is assigned to if you expand the [Mrk Txt List] code. In Reveal Codes, move the red cursor before a code to expand it.

To revise a list entry, edit the text between the two [Mrk Txt List] codes. You can remove an entry completely by clicking and dragging one of the [Mrk Txt List] codes out of the Reveal Codes window (the mate is deleted automatically).

DEFINING AND GENERATING LISTS

Long and multi-part documents tend to have more elements than the average document, and keeping track of them can be very time-consuming, both for the creator and for the reader. Creating a separate list for figures, tables, equations, and other elements can help you keep things organized.

TIP FROM

Generating a list of figure captions is a great way to check for consistency in figure numbering and to make sure the caption text is adequately descriptive.

You can define multiple lists in a document, each on its own page, or embedded in the body text. You can define lists before or after you mark up the document. Follow these steps to define a list:

1. Click in the document where you want a list to appear.
2. If you want the list on a page by itself, press Ctrl+Enter to insert a hard page.
3. Type a title for the list, and then press Enter a few times to create space between the title and the list entries.
4. If the List tab of the Reference Tools dialog box is displayed, click the Define button. Otherwise, choose Tools, Reference, List to display the feature bar, and then click Define. The Define List dialog box appears (see Figure 16.17). The names of lists that you've already used when marking entries appear.

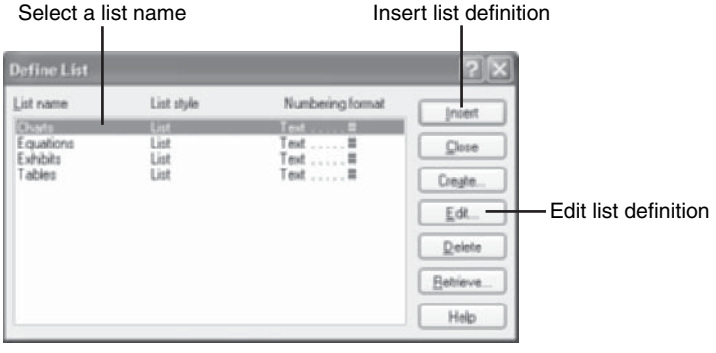


Figure 16.17
In the Define List dialog box, you can choose the list that you want to insert.

5. Select a list name in the list box. By default, the entry has dot leaders out to the page number, which is positioned at the right margin. The page number format being used in the document is used on the list page numbers.

NOTE

If you're defining lists before marking entries in the text, you might not see any list names in the List Name list box. To create a new list, click Create, type a name for the list, and then click OK. Go ahead and create the list with the default settings; you can modify them from the Define List dialog box.

TIP FROM

Consistency across documents is important. When you've figured out how you want to do something, such as defining a list, for example, you can save time by retrieving that definition from another document. To retrieve list names from another file, click the Retrieve button in the Define List dialog box to open the Retrieve List Definitions dialog box. Type the name of the file in the Filename text box, or click the Files icon to browse for it. When you've selected the file, the list definitions for that document are displayed in the Name list box. Choose one or more list names, and then click OK to add them into the Define List dialog box.

6. To accept the default settings and insert a list definition code in the document, click Insert. WordPerfect inserts the following text in the document: <<List will generate here>>.
7. Repeat steps 1–6 to insert definition codes for all the list names. Click Close when you're done.

If the next page is the beginning of the body text, make sure you reset the page numbers back to 1 at the top of that page so that the List pages don't throw off the page numbers of the document.

EDITING THE LIST STYLES

If you want to modify the defaults, select a list name in the Define List dialog box, and then click Edit to display the Edit List dialog box (see Figure 16.18), where you have the following options:

- Click the Position drop-down list arrow and choose a position for the page numbers in the list.
- Click Page Numbering to use a custom page number format.
- Click Change if you want to edit the list style.
- If you want WordPerfect to insert the caption text in the list, click the List Box Captions Automatically drop-down list arrow and choose the type of box this list is intended for. For example, if this is a Figures list, choose Figure Box.

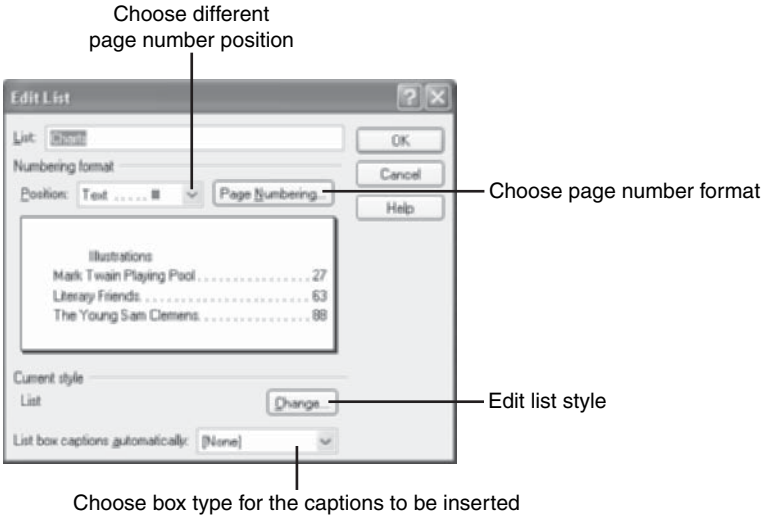


Figure 16.18
You can use the options in the Edit List dialog box to edit the default page number position and page number format. You can also select to have WordPerfect automatically insert caption text in the list.

When you're ready to generate the lists, click the Generate button. Choose to save changes to subdocuments, or to build hyperlinks, and then click OK to assemble the lists. Figure 16.19 shows a sample list.

If the captions are missing from a list of figures, see "Blank Entries in a Figure List" in the Troubleshooting section at the end of this chapter.

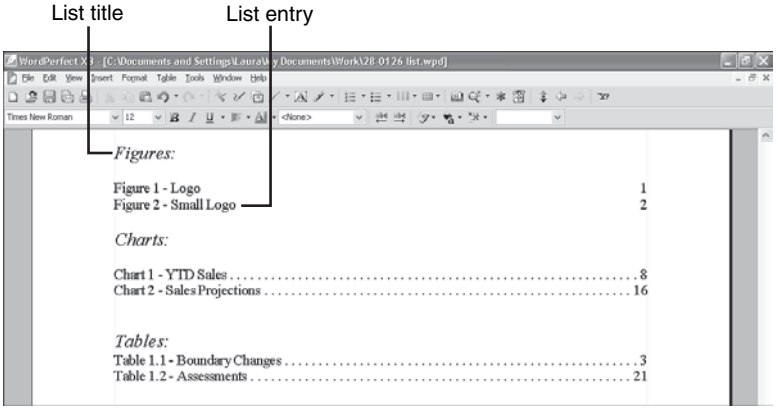


Figure 16.19
Lists make it easier for the creator and the reader to keep track of where supportive elements are located.

TROUBLESHOOTING

DOCUMENT MAP ERROR MESSAGE

I turned on Document Map for one document and now, whenever I try to open another document, I get an error message that says the document does not contain the necessary code to create a document map. How do I get rid of this error message?

The easy answer is to turn off the Document Map view. Document Map is "sticky," which means it stays on for all new documents. If the document that you are opening doesn't contain any index, table of contents, or table of authorities entries, WordPerfect won't be able to display a document map for that document. Hence, the error message. Choose View, Document Map, or press Alt+Shift+M to turn Document Map off.

If you still get the message, make sure your default printer is not set to a fax driver. This is known to cause this particular error. To change your default printer, choose Start, (Settings), Printers. Right-click the printer that you use the most and select Set As Default.

THE TABLE OF CONTENTS IS MISSING ENTRIES

I've just generated a table of contents, but not all the headings are showing up: I marked three levels of headings for the table, but only two appear.

You have probably defined the table for only two levels, but have marked entries for three levels. Move to the top of the table of contents page. Turn on Reveal Codes (by pressing Alt+F3) and find the [Def Mark] code at the top of the page. Double-click the code to edit it. In the Define Table of Contents dialog box, click the up spinner arrow to increase the number of levels to three, and then click OK. Because you've edited the original code, there is no duplicate code to delete. Regenerate the table—the third-level headings should show up now.

SEVERAL TABLE OF CONTENTS ENTRIES ARE BOLD

After making some revisions and marking new entries for the table of contents, I regenerated the table. All the new entries are bold, but the rest of the table is not.

When you select text to mark for a table of contents, you have to make sure that you don't include any formatting codes in the selection. If you do, those formatting codes are copied into the table of contents along with the selected text. You can turn on Reveal Codes (by pressing Alt+F3) and delete the [Bold] codes, but the next time you generate the table, they'll be back. A permanent solution is to go back to each new entry and delete the first [Mrk Txt ToC] code (which automatically deletes its mate). Then, position the insertion point on the first character and select only the text of the heading (plus any styles that are in place), but not the [Bold] codes. If necessary, choose Tools, Reference, Table of Contents to display the Table of Contents feature bar. Click a Mark button to reinsert the [Mrk Txt ToC] codes. Repeat for the other headings, and then regenerate the table.

Obsolete Short Forms

While making heavy revisions, I removed some of the authorities that had been marked with a full form. Even though the full forms are gone, the short forms still show up in the list. Is there any way to strip out these obsolete short forms?

Short form information is stored in the document prefix. If you haven't had any contact with the document prefix until now, it's invisible, you can't edit it, and it is the root of all document evil. Rebuilding the document prefix fixes all manner of problems. First, make sure the file isn't already open. Then open a blank document, type an x, and then press Enter. Click Insert, File. Select the file, and then click Insert. Delete the x and the blank line, and then resave the file. Save this document under the original filename so you don't have duplicate files lying around. When the document prefix is rebuilt, only the short forms that are used in the document appear in the list.

A Concordance Entry Is Too Long

I've just generated an index, and I get an error message that says "Unable to generate: concordance entry is too large," followed by the offending entry. What is the length limit on concordance file entries?

A concordance file entry must not be longer than 63 characters. I tested this a bit and got flaky results between 55 and 60 characters, so your best bet is to keep the entries down to 50 characters or so.

Blank Entries in a Figure List

I've just generated a list of figure captions, and some of the entries only have page numbers—there isn't any caption text, just dot leaders and page numbers. What did I do wrong?

There is a setting in the Edit List dialog box where you can choose to have WordPerfect automatically copy the caption text into the list. If you haven't selected a box type, the captions won't be copied into the list.

Choose Tools, Reference, List. Click the Define button on the List tab. Select the list name for the figures, and then click Edit. Click the List Box Captions Automatically drop-down list arrow and then choose the type of box you have used.

CHAPTER 17

Interactive and Multimedia Documents

In this chapter

by Read Gilgen

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RETHINKING THE CONCEPT OF DOCUMENTS

Technological advances over the years have gradually increased the power of the written document to communicate more effectively. The typewriter made it easier to read the written word. Early word processors helped writers to organize their documents by offering the capability of cutting and pasting, and to proofread documents. Not too long ago, elements of desktop publishing, including complex layout and graphics, crept into the word processing arena.

Today we've begun another leap forward, as technology enables us to get at information differently. No longer must we read a document on a printed page. Instead we can read it on a computer screen or on a portable tablet or handheld device. No longer must we follow a document from beginning to end, but we can jump from one place to another, or even from one document to another. Further, because we're not tied to paper and print, we can add multimedia elements, including sound or video.

CREATING HYPERTEXT LINKS

You're already accustomed to using Web page links, and you know that some Web pages use links successfully in helping you navigate a document while others use links that seem to make little sense. The same concepts that pertain to creating links in Web pages also apply to WordPerfect documents. In a nutshell, you want the reader to be able to jump from one place to another in your document, following logical links, and without getting lost.

The first step in creating a nonlinear document is to link sections so that the reader can jump from where they are to a target destination. You do this by creating bookmarks, which are like targets where you want to land, and then by creating hyperlinks, which enable you to jump from where you are to a target bookmark.

TIP FROM

Read Gilgen

> Before setting bookmarks in your document, you might want to visually sketch out how you view the organization of your document, including places readers will most likely want to go (bookmarks), and places from which you expect them to link. This makes it easier to systematically go through the document and add bookmarks and hyperlinks.

CREATING LINKS WITHIN DOCUMENTS

To create a bookmark in a document, follow these steps:

1. Go to the spot in the document you want to bookmark.
2. Choose Tools, Bookmark. WordPerfect displays the Bookmark dialog box (see Figure 17.1, which shows a bookmark already displayed).

Figure 17.1
You can use the Bookmark dialog box to create and manage your document's bookmarks.

3. Click Create to display the Create Bookmark dialog box (see Figure 17.2).

Figure 17.2
The Create Bookmark dialog box suggests using adjacent document text, which you can edit or replace with something shorter or more descriptive.

NOTE

> The Create Bookmark dialog box attempts to guess at the bookmark name, based on the text following the insertion point. Often these names are long, and not always descriptive. You should change them to shorter, recognizable, and descriptive bookmark names.

4. Type the name of the bookmark, and click OK to set the bookmark and to return to the document.

If you select text before setting the bookmark, WordPerfect uses the selected text for the bookmark name. WordPerfect also identifies the bookmark type as Selected (refer to Figure 17.1), which means that both the location and the selected text are part of the bookmark.

Bookmarks can be used any time—for example, to quickly go to a bookmark while editing. You can also set a QuickMark, which does not require a name, by choosing Set QuickMark (refer to Figure 17.1). You can access the QuickMark or other bookmarks by choosing Tools, Bookmark. You then click the bookmark you want to go to and click Go To.

You can also access your bookmarks by choosing Edit, Go To or pressing Ctrl+G. In the Go To dialog box, click Bookmarks and select a bookmark from the drop-down list (see Figure 17.3). Click Go To to jump to the selected bookmark.

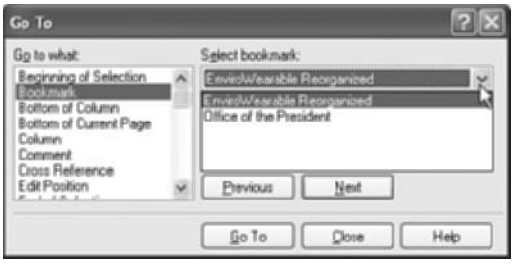

Figure 17.3
The Go To dialog box is an easy way to jump to your document bookmarks.

If you choose Set QuickMark on File Save, and also Go to QuickMark on File Open (refer to Figure 17.1), the QuickMark is automatically set at the insertion point each time you save the document, and when you open it again, WordPerfect jumps directly to that bookmarked location. If the bookmark type is selected, you can also click Go To & Select, which causes WordPerfect to jump to the bookmark and select the bookmarked text.

After you have created bookmarks, you can create hyperlinks to those bookmarks. To create a hyperlink, follow these steps:

1. Create or find the text you want to link from. You should choose text that suggests to the readers that they can get more information by following the link.

NOTE

> A common mistake in Web page design is to create links using words like "click here" or "more," which aren't really descriptive of what the link relates to. Likewise, in your WordPerfect documents, try using more descriptive links such as "text for Assembly Resolution AR1.33" or "2005 Prospectus."

TIP FROM

Read Gilgen

> For very long documents, you can create a table of contents or menu at the beginning of the document and then use those entries to link to sections of the document.

2. Select the text or object to be linked.

NOTE

> You cannot link from nothing. However, you can link from graphic objects as well as text. Whatever you link, you must select it first.

3. Choose Tools, Hyperlink. WordPerfect displays the Hyperlink Properties dialog box (see Figure 17.4).

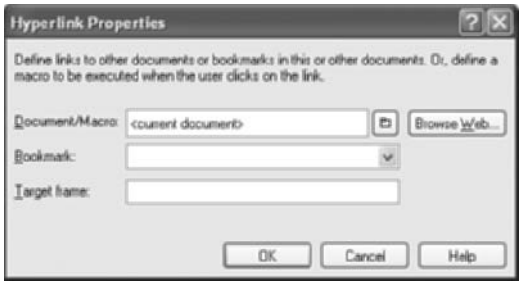

Figure 17.4
The Hyperlink Properties dialog box enables you to create links to bookmarks, to other documents, and even to Web or e-mail addresses.

4. Click the Bookmark drop-down list, and select the bookmark you want to jump to.
5. Click OK to return to your document. WordPerfect displays the hyperlink using the current hyperlink style, which by default is blue, underlined text (see Figure 17.5).

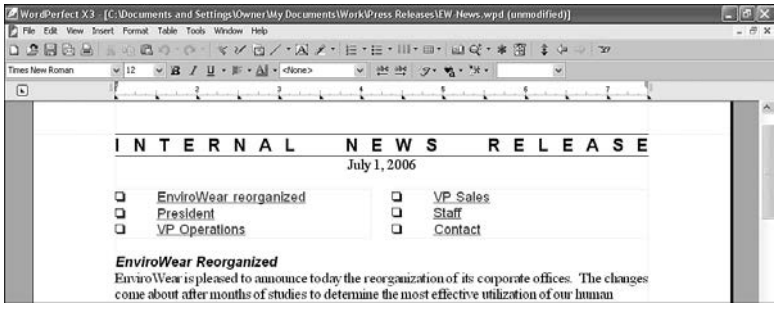

Figure 17.5
Hyperlink text usually appears underlined and in blue.

After you create a link, assuming that hyperlinks are active (the mouse pointer appears as a hand), click the link to jump to the target bookmark (some browsers may require that you double click the link).

TIP FROM

Read Gilgen

You can control the look of hyperlinked text by changing the Hypertext style. To do this, choose Format, Styles.

➔ For more information on working with styles, **see** Chapter 9, "Formatting with Styles."

CAUTION

Because hyperlinked documents are not linear, it can become easy for a reader to get lost while following hyperlinks. You can help the reader by inserting links that jump back to the top of the document, or that return to a table of contents or menu.

TIP FROM

Read Gilgen

WordPerfect enables you to draw action shapes, such as forward, back, return, or home buttons, like those found in Web browsers (choose Insert, Shapes, Action). You can link those shapes to bookmarks, thus helping the reader navigate your document.

➔ For information on creating action shapes, **see** "Inserting Shapes," **p. 325**.

If you change your mind and need to edit or delete a bookmark or a hyperlink, consider these options:

- If you know where the code is located, move the insertion point to that location and open Reveal Codes (by choosing View, Reveal Codes or pressing Alt+F3). Then delete the bookmark or hyperlink code.
- To remove a bookmark, which might be difficult to find in a document, choose Tools, Bookmark. In the Bookmark dialog box, select the bookmark you want to remove and choose Delete.
- To rename a bookmark, access the Bookmark dialog box and choose Rename. This has the same effect as editing a bookmark, because there is nothing else to change.
- To edit a hyperlink, whether text or a graphic image, right-click the link and choose Edit Hyperlink from the QuickMenu. WordPerfect displays the Hyperlink Properties dialog box (refer to Figure 17.4). Change the link and click OK. You can also edit hyperlinked text by choosing Tools, Hyperlink, after positioning the insertion point inside the hyperlink text area. However, using QuickMenus is much quicker and easier.

LINKING TO DOCUMENTS

You can also create hyperlinks from one document to another, and even to specific bookmarks within the target document. To create a hyperlink to another document, follow these steps:

1. Create the target document. If you intend to link to specific locations in the document, create bookmarks to identify those locations.
2. In the document from which you want to link, select the text or object you want to link and choose Tools, Hyperlink. WordPerfect displays the Hyperlink Properties dialog box (refer to Figure 17.4).
3. Type the full path and filename of the document you want to link to, or click the browse button at the right of the text box to browse for the file.

CAUTION

When linking to another document, be sure to include the full drive and path, along with the filename. Otherwise, WordPerfect might not be able to find the file when you try to link to it.

TIP FROM

Read Gilgen

If you're linking documents on a network drive for use by others, use UNC (universal naming convention) instead of drive letters. Others on the network might not have mapped their drives the same way you have. For example, instead of drive:\path\filename, you should use \\server\volume:\path\filename.

4. If you're linking to a bookmark in the target document, type the name of the bookmark in the Bookmark edit box or select a bookmark from the Bookmark drop-down list.

TIP FROM

Read Gilgen

If you browse to choose the filename of the target document, WordPerfect also reads ahead and returns a list of valid bookmark names in the Bookmark drop-down list.

CAUTION

You should link to bookmarks by using the same upper- and lowercase characters found in the bookmark. Although WordPerfect ignores case, Web pages don't. If you later publish your document as a Web page, you might find that links don't work simply because the case in the bookmark and the link don't match.

5. Click OK to return to your WordPerfect document.

When you click (or double click, depending on your browser) a link to another document, WordPerfect opens that document. If you also specified a target bookmark, WordPerfect then jumps to that location.

TIP FROM

Read Gilgen

If you intend for the reader to return to the original, or home, document, you should also place a link in the target document that jumps back to the home document. Remember that you can link text or graphic objects, such as action buttons.

LINKING TO MACROS

You can also create a link to a macro, so that when you click the link, WordPerfect executes the macro. Macros could perform an action (such as sorting a table), or could even launch another program (such as the Windows Calculator).

To link to a macro, follow these steps:

1. Create the macro you want to execute.

➔ For information on creating and using macros, **see** Chapter 21, "Using Experts and Macros."

2. In the document to which you want to link the macro, select the text or object from which you want to link.

3. Choose Tools, Hyperlink. WordPerfect displays the Hyperlink Properties dialog box (refer to Figure 17.4).
4. In the Document/Macro edit box, type (or browse for) the name of the macro you want to execute.
5. Click OK to save the link and return to your document.

Now you can simply click the link to execute the macro.

CREATING LINKS TO THE INTERNET

The Internet has revolutionized the way we share information. The World Wide Web is a rich source of information. And many companies also use an intranet to store and share information via Web pages. Either way, using external (Internet) or internal (intranet) Web sites, you can create links so that with just a click of a button, the reader can jump from your WordPerfect documents to Web documents.

NOTE

> WordPerfect does not distinguish between Internet and intranet documents. Web documents are the same, and you access them the same, whether they're available to the whole world or just to your company site.

USING AUTOMATIC HYPERLINKS

By default, WordPerfect automatically creates links to Web site addresses and even to e-mail addresses. Type a Uniform Resource Locator (URL), followed by a space or hard return, and WordPerfect underlines the address, highlights it in blue, and creates a hyperlink to that address (see Figure 17.6).

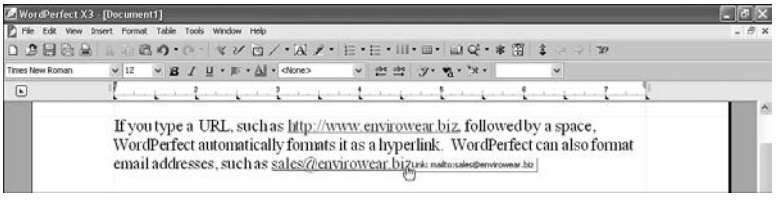

Figure 17.6
If you type a space following a Web or e-mail address, WordPerfect automatically creates a hyperlink.

NOTE

> A URL (Uniform Resource Locator) is the standard method for describing a World Wide Web address. For example, in the following address you find three distinct components:
>
> `http://www.mycompany.com/sales/june/report.html`
>
> The first is the protocol being used to "serve" you the information (http://). The second is the name of the Internet computer, or Web server, which consists of at least the domain name (mycompany.com) along with any other names that distinguish more than one server in that domain. The final component is the path to the specific document you want, ending in the actual filename (/sales/june/report.html).

CAUTION

> Do not add a period or other end-of-sentence punctuation following a URL or e-mail address before typing the space or pressing Enter. Doing so adds that punctuation to the address, and as a result the link will not work.

WordPerfect also distinguishes between URLs and e-mail addresses, and creates an e-mail link when it finds an address that contains the @ symbol.

When you click an Internet link in a WordPerfect document, WordPerfect launches your default browser, and goes to the designated Web site. If you click an e-mail address, WordPerfect launches your default mail program so you can create a mail message.

NOTE

> What you believe to be your default mail program may not be what Windows thinks it is. If you click a mail link (or double click it, if nothing happens), and it opens a mail program that's not what you normally use (for example, Outlook), you have to change your system settings to recognize your mail program. Go to the Windows Control Panel, double-click the Internet Options icon, click the Programs tab, and from the E-mail drop-down list, select your default e-mail program.

You might not like this automatic hyperlink feature, especially for printed documents, because links appear underlined and serve no useful linking purpose. To turn off the feature, follow these steps:

1. Choose Tools, QuickCorrect.
2. Click the SpeedLinks tab (see Figure 17.7).

Figure 17.7
You can turn off automatic hyperlink formatting in the SpeedLinks tab of the QuickCorrect dialog box.

3. Deselect Format Words As Hyperlinks When You Type Them.
4. Click OK to return to your document.

This setting remains until you change it again. Now you must create hyperlinks to Web and e-mail addresses by hand. Note, however, that changing this setting does not remove links you have already created.

USING SPEEDLINKS

SpeedLinks are like QuickCorrect words in that you type one word (for example, @EnviroWear), and WordPerfect automatically changes it to another (for example, EnviroWear without the @ symbol) and also adds a hyperlink to the corrected text (for example, `http://www.envirowear.biz`).

To create a SpeedLink, follow these steps:

1. Choose Tools, QuickCorrect.
2. Click the SpeedLinks tab (refer to Figure 17.7).
3. In the Link Word box, type the word you want to appear in your document.
4. In the Location to Link To box, type the complete URL you want to link to (for example, **`http://www.envirowear.biz`**). If you want to create a SpeedLink to an e-mail address, type **`mailto:`** followed by the e-mail address (for example, **`mailto:sales@envirowear.biz`**).

NOTE

> You can use SpeedLinks to link to an Internet URL or e-mail address, or to another document. Use the Browse button to find another document to link to.

5. Click Add Entry to add the SpeedLink to the list. WordPerfect adds the @ symbol to the beginning of the word.
6. Click OK to return to your document.

To use the SpeedLink, type the `@` symbol followed by the SpeedLink word (for example, **`@EnviroWear`**). WordPerfect inserts the SpeedLink word as a hyperlink.

CAUTION

> Do not use fully capitalized words or acronyms as SpeedLinks. When you do, WordPerfect also capitalizes the hyperlink, which then may not link properly because the document portion of many Web site addresses are case-sensitive.

CREATING, EDITING, AND DELETING INTERNET LINKS

To create an Internet link without using the automatic hyperlink feature, follow these steps:

1. Select the text or object to which you want to attach a hyperlink.
2. Choose Tools, Hyperlink to access the Hyperlink Properties dialog box (see Figure 17.8, shown here with a URL).

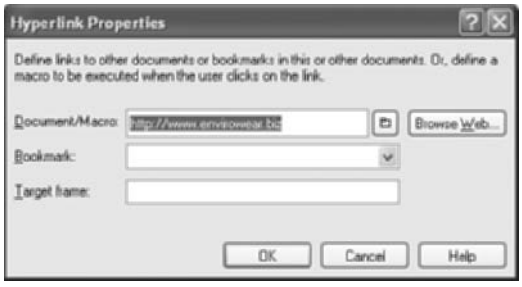

Figure 17.8
You can use the Hyperlink Properties dialog box to create links to Web site URLs and e-mail addresses.

3. In the Document/Macro box, type the complete URL (for example, `http://www.envirowear.biz`). If you want to create a link to an e-mail address, type `mailto:` followed by the e-mail address (for example, `mailto:sales@envirowear.biz`).
4. If you are linking to a bookmark within a Web page (sometimes called an anchor), type the name of the bookmark in the Bookmark box.
5. If you are creating a page that will be part of a Web page frameset, you can specify the frame in which the linked Web document or Web site will appear. This option has no effect on hyperlinked WordPerfect documents.
6. Click OK to add the hyperlink to the selected text or object.

To edit a hyperlink, right-click the link and choose Edit Hyperlink from the QuickMenu. Then, in the Hyperlink Properties dialog box, make any needed changes.

CAUTION

> When entering a URL by hand, be sure to carefully type the URL, including all special characters, such as the tilde (~). Generally, you should use lowercase characters. Some Web servers distinguish between upper- and lowercase characters, and using an upper-case character in the URL might not work.

To remove a hyperlink, open the Reveal Codes window (by choosing View, Reveal Codes or pressing Alt+F3) and delete the hyperlink codes. There is no way to remove a hyperlink code using the menus or dialog boxes. However, you can use Find and Replace to search for

the Hyperlink Begin codes and replace them with nothing. This removes the codes and the hyperlink style (for example, blue underlined text).

If you are having trouble making your Internet links work, see "Checking Links" in the Troubleshooting section at the end of this chapter.

EMBEDDING SOUNDS IN DOCUMENTS

You know documents have changed when they can talk back to you! Indeed, you can include recorded sound clips in your documents.

NOTE

> Before you can use sound in a WordPerfect document, you must have a sound-capable computer (with a working sound card and speakers). If you intend to record your own sounds, you also need a microphone that's compatible with your sound card.

INSERTING SOUNDS

Assuming that your computer is wired for sound (that is, that your computer has a sound card, a microphone, speakers, and the appropriate sound software), follow these steps to add sound to a WordPerfect document:

1. Choose Insert, Sound. WordPerfect displays the Sound Clips dialog box (see Figure 17.9).

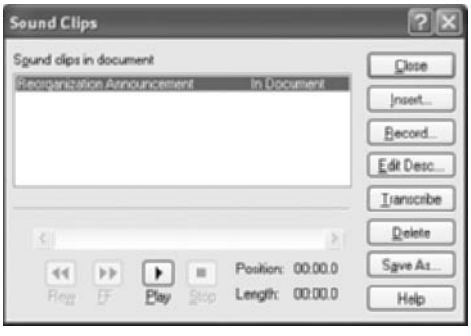

Figure 17.9
The Sound Clips dialog box lists clips already in the document, and also enables you to add or record clips.

If you're not getting any sound from your system, see "Getting Wired" in the Troubleshooting section at the end of this chapter.

2. Click Insert to select and insert a sound clip into the document. WordPerfect displays the Insert Sound Clip into Document dialog box (see Figure 17.10, which shows Name and File already added) .

Figure 17.10
In the Insert Sound Clip into Document dialog box, you can specify the name of the sound file to insert.

3. Browse to find the sound file you want. In this dialog box, you also have the following options:
   - **Name**—You can change the name of the clip to something that describes it better than Clip #1, Clip #2, and so on.
   - **Link to File on Disk**—This leaves the sound file on disk, either on your local hard drive or on a network drive. This also means the document will have a smaller file size, and that others might not have access to the sound file if they use the document.
   - **Store in Document**—Selecting this option makes for a large file size, but it also means that regardless of where the document goes, the sound file travels with it.

NOTE

> Typically, sounds used in Windows, especially voice recordings, are stored in .wav file format. However, you can also insert other types of sound files, such as music MIDI (.mid) files. The only requirement is that the proper sound drivers be installed in Windows to play these other sounds.

If you're having trouble playing MIDI files, see "Installing Sound and Video Drivers" in the Troubleshooting section at the end of this chapter.

4. Click OK to close both the Insert Sound Clip into Document and Sound Clips dialog boxes and return to your document. WordPerfect displays a sound (speaker) icon in the left margin (see Figure 17.11, which also shows one other sound linking option).

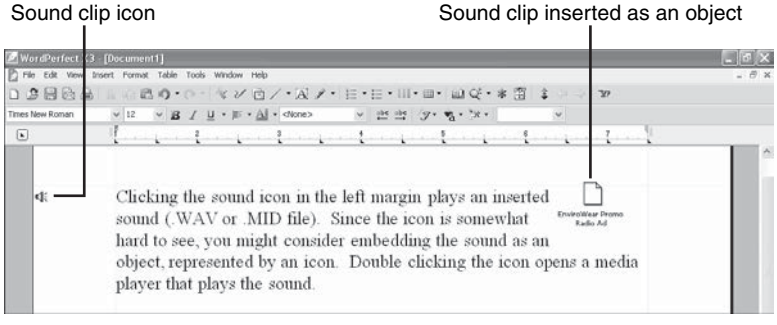

Figure 17.11
The speaker icon in the left margin indicates that there is a sound clip inserted in the document. You can click the icon to play the sound.

To play an inserted sound clip, click the speaker icon in the left margin.

NOTE

> Depending on your view of the document, you might not see what's in the margins. You can decrease the zoom percentage, or scroll horizontally to the left to see the sound icon.

LINKING SOUNDS

Although it might seem logical to link a sound to an image, such as an action button, WordPerfect does not let you do so. You can hyperlink only to other WordPerfect or Web documents.

An alternative is to insert a sound object the same as you do a video object, and display the inserted object as an icon (refer to Figure 17.11). By double-clicking the icon, the reader activates a media player that plays the sound.

➔ For information on inserting sounds as objects, **see** "Embedding Video in Documents" later in this chapter. The procedure for embedding sound and video clip objects is identical.

RECORDING SOUNDS

You can also record your own sound file by using your computer's microphone. To do so, follow these steps before inserting the sound, as described previously:

1. Choose Insert, Sound to access the Sound Clips dialog box (refer to Figure 17.9).
2. Click Record. WordPerfect launches the Windows Sound Recorder program (see Figure 17.12).

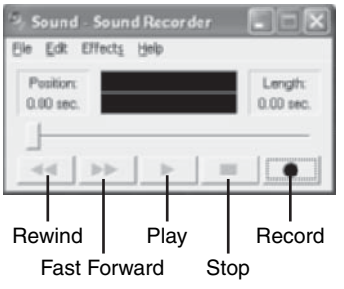

Figure 17.12
With a microphone and the Windows Sound Recorder, you can record sounds to insert in your documents.

If your microphone doesn't seem to work, see "Is the Right Switch On?" in the Troubleshooting section at the end of this chapter.

3. Get your microphone and text ready, and click the Record button.
4. When you finish recording, click the Stop button.

5. Click the Play button to review the sound, and use other Sound Recorder tools to edit the selection (for example, clip it, amplify it, or even add an echo) .
6. Choose File, Save (or Save As), and save the sound file; remember its name and location for future reference.

Now you need to follow the procedures for inserting a sound using the file you just recorded.

NOTE

> Although the Windows Sound Recorder is convenient to access from within WordPerfect, it is a rather rudimentary recording program. For example, it only permits recordings up to 60 seconds.
>
> Other sound recorders allow for much more flexibility in creating and editing sound recordings. One such excellent program is Audacity, which you can download free from SourceForge (`http://audacity.sourceforge.net`).

TRANSCRIBING RECORDINGS

One use for embedding a sound recording in a document is to later transcribe that recording (for example, a dictated memo). WordPerfect enables you to listen, and repeat as often as necessary, while typing the transcription. To transcribe a sound, just right-click the sound icon in the left margin and choose Transcribe, or access the sound clip by choosing Insert, Sound, selecting the sound, and clicking the Transcribe button (refer to Figure 17.9). WordPerfect displays the Transcription feature bar (see Figure 17.13).

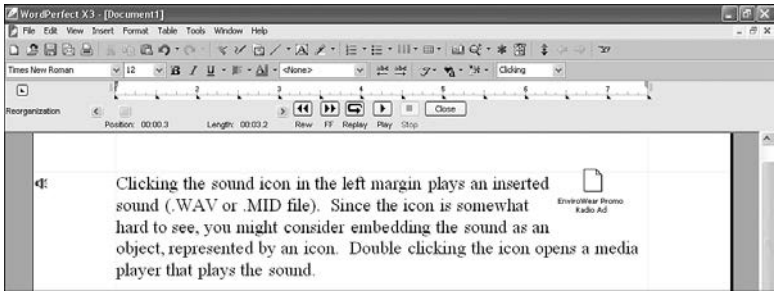

Figure 17.13
The Transcription feature bar helps you play segments of sound clips as you transcribe a recording.

You now can use the Transcription Feature bar to play or pause a sound, replay a segment from the last pause point, or fast forward or rewind.

TIP FROM

> One alternative to recording and transcribing text is to use a speech recognition program, such as Dragon NaturallySpeaking. WordPerfect is designed to work well with such programs, enabling you to convert your speech into commands and words on-the-fly, thus avoiding the creation of large sound files.

TIP FROM

Read Gilgen

One interesting use for the Transcription feature bar might be as a learning tool, to help memorize phrases or dialogs, or for working with foreign languages or complicated passages where being able to repeat segments is useful.

EMBEDDING VIDEO IN DOCUMENTS

With the common availability of digital cameras that can also record short video clips, adding motion video to a WordPerfect document is finally a reality. Instead of merely describing a product, for example, you can use a video clip that shows the product in action, or from different angles.

Video clips are inserted and played as OLE objects, which means they are embedded in the WordPerfect document, but played by another program, a player that appears within WordPerfect.

➔ For more information on OLE, **see** "Using OLE Linking and Embedding Options," **p. 346**.

NOTE

Typically, Windows video files use the .avi filename extension. Other types of video clips, such as those created by some digital cameras, or QuickTime (.mov) or MPEG (.mpg) files, also can also be embedded in WordPerfect documents.

To insert a Windows .avi video clip, follow these steps:

1. Choose Insert, Object. WordPerfect displays the Insert Object dialog box.
2. Click Create from File (see Figure 17.14).

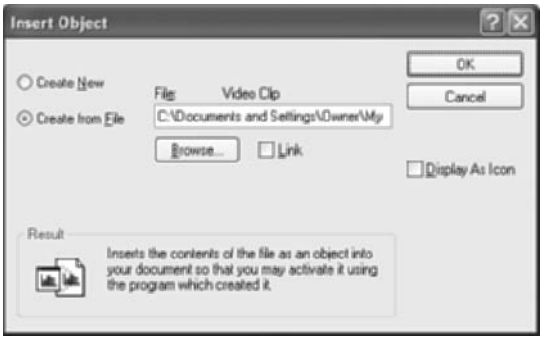

Figure 17.14
You can insert OLE objects, such as video clips, using the Insert Object dialog box.

3. Browse or type the name of the video file you want to insert.

4. You can choose among these options:
   - **Link**—If you don't want the video clip to become part of your document, you can link to a copy on your computer or on the network by choosing this option.
   - **Display As Icon**—You can display a still image (the first video frame) in your document, or you can choose this option to display an icon that lets the reader know a video image is available for viewing.
   - **Change Icon**—If you select Display As Icon, this button appears; otherwise, you do not see it. Click the button to display the Change Icon dialog box (see Figure 17.15). Here you can select a new icon to represent the clip, and also provide your own custom label to identify the clip. Click OK to return to the Insert Object dialog box.

Figure 17.15
If you display the OLE clip as an icon, you can select a different icon than the one suggested by WordPerfect.

5. Click OK to insert the video clip.

Figure 17.16 shows two video clips—one of which is displayed as the first frame of the video clip, and the other of which is represented as an icon. Both are in graphics boxes, which you can move and resize as needed. Note, however, that if you increase the size of the video frame, you decrease the quality of the image.

Figure 17.16
Video clips can be displayed using the first frame of the clip, or can be represented by an icon. The Windows Media Player replaces WordPerfect menus and toolbars so you can start, stop, or rewind a video clip.

To play the clip, choose one of these options:

- If you inserted the video frame without the link or icon options, you can double-click the frame, and then double-click it again to begin playing the clip in place in the document. You can also play the clip by clicking the Play button on the Windows Media Player controls, which appear in place of the WordPerfect menus and toolbars (refer to Figure 17.16).

NOTE

> Windows has two media players, each named the same thing. The internal, built-in Windows Media Player is shown here, and it typically handles all native Windows video formats (.avi). Windows Media Player is a separate, full-featured program that can play all types of audio and video media, can work with playlists, and more. This program is just one of many standalone programs that can play video clips. If you have installed another such player as your default media player, such as WinAmp, or RealPlayer, that program will launch in place of the Windows Media Player for non-.avi files.

- If you linked the video clip, or if you used an icon to represent the video clip, you can double-click the object to launch the Media Player, which appears as a separate control program and viewing window (see Figure 17.17). You can use the player's controls to start, stop, rewind, and so on.

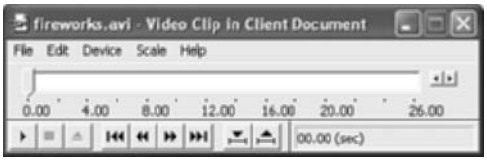

Figure 17.17
The Windows Media Player operates as a detached, separate program when associated with a linked or icon-represented video clip.

- If you linked to a non-.avi type video file (such as .mpg or .mov), when you double-click the object you launch the default player for that type of video. For example, if you have WinAmp installed as your default .mpg player, WinAmp automatically plays .mpg files when you double-click them (see Figure 17.18).

The internal Windows Media Player, like other media players, offers a variety of options, including whether to include a caption, how to display lapsed time (time, frames, tracks), and so on. You can experiment with the player that appears on your system to discover some of the options available for presenting a video clip.

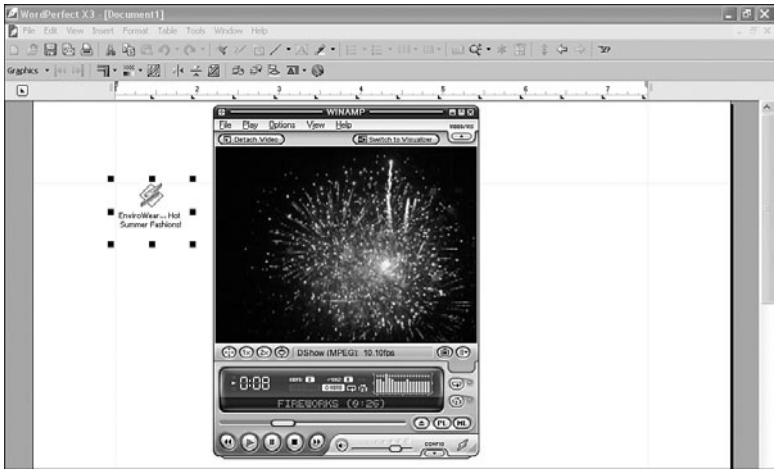

Figure 17.18
Linked or icon-represented non-.avi video clips play in the media player, such as WinAmp, that is associated with that particular media type.

PUBLISHING INTERACTIVE AND MULTIMEDIA DOCUMENTS

Printing traditional documents requires a printer. It's quite simple, really. But publishing interactive and multimedia documents sometimes isn't quite so straightforward.

For readers to be able to read your documents, they must have computers that can do one or more of the following:

- **Use WordPerfect**—Although you can convert documents to Word, that doesn't necessarily mean that all links, sounds, video clips, and so on convert correctly. If the people who must read your documents don't use WordPerfect, they might not get the full picture.
- **Connect to the Internet**—If you have links that connect to Web pages, you must be connected to the Internet via a local or dial-up connection if you want to view linked Web sites. If some of your readers don't have Internet access, you need to make sure the document is still effective without its Internet links.
- **Play sound files**—Nearly every computer these days comes equipped with a sound card and speakers, but it's not a given that all needed sound drivers are installed. One person might be able to play .wav files, for example, but not MIDI files.
- **Play video clips**—Not every computer is set up to play even standard Windows .avi files. If you use other video formats, for example QuickTime files, the user might first have to install the QuickTime player.

As a publisher of electronic documents, you must make decisions about what's important, who your target audience is, and what percentage of your audience is likely to be able to read your document. Sometimes you can take steps to ensure that they can, such as convincing your computer support department that everyone needs sound cards and speakers, or that everyone should have QuickTime video players installed.

Finally, you also can, and should, design your documents so that they're still effective, communicating essential information, even without Internet links, sounds, or video clips.

CREATING ACCESSIBLE DOCUMENTS

As noted at the beginning of this chapter, we can now interact with documents differently than we have in the past. This has a side benefit in that it can make documents even more accessible to the handicapped.

UNDERSTANDING THE ISSUES

In 1991, the United States Congress passed the Americans with Disabilities Act, which has helped us understand the challenges that face persons who would like to have access to information, but who are physically challenged, or sight or hearing impaired.

In the past, the end result of a word processing document was the printed page alone, thus creating barriers to the flow of information—for example, for the blind. Further, with an emphasis on the graphical environment and the use of the mouse to accomplish basic tasks, many persons with physical limitations were also being edged out of the creative process.

However, recently we have seen an emphasis on providing access both to the word processing program as well as to the documents produced by the program.

COREL'S COMMITMENT TO ACCESSIBILITY

Corel's commitment to provide accessible software is described in its Accessibility Initiative White Paper. (This document tends to change locations on the Corel Web site. Currently you can find it at `http://www.corel.com/content/pdf/wpo12/Accessibility_and_WordPerfectOffice12.pdf`. Besides adhering to government and industry accessibility guidelines, Corel is also concentrating on several specific issues, including the following:

- **Keyboard Access**—This objective is to make sure that users can access all program features and commands using only the keyboard, and documenting the method of access. For example, WordPerfect now ships with a printed keyboard template.
- **Keyboard Focus**—Focus is the button or menu item that is activated by pressing the Enter key. Navigating through a dialog box by pressing Tab to be able to arrive at desired functions is now more logical and easier. Further, screen readers can now determine the focus location so the user doesn't have to touch all the buttons to find what he or she needs.
- **High Contrast**—This emphasis is to allow for larger fonts so that characters are easier to distinguish. The implementation of the wheel mouse to zoom in or out on a document is a new feature in WordPerfect 10.

- **Sound Alternatives**—An error beep does no good if you can't hear it. This effort provides for alternative visual cues to complement sound-only cues.
- **Speech Recognition**—WordPerfect works well with speech recognition programs, such as Dragon NaturallySpeaking, which enables users to dictate content and to control the program using voice alone. The accuracy of these programs is very good, and it opens up a whole new world to those with severely restricted mobility.

ADAPTING DOCUMENTS FOR ACCESSIBILITY

In addition to making the program easier to use, several of the document features discussed in this chapter can make information more accessible; for example

- **Links**—You can organize your information in sections, and provide links to help the visually impaired navigate better through your document. Imagine that you had to read a document through a straw, not being able to scan the page. You wouldn't know what to read and what not to read, and being afraid you'd miss something, you'd have to read the entire document. On the other hand, if you had a menu, you would have an overview, and could determine just what you needed to read. Links would take you quickly to the pertinent sections, and other links would return you to the menu.
- **Alternative Text**—Do you depend on communicating information by the graphic images you use? Will a blind person miss vital information because he or she cannot see an image? You can right-click an image and choose HTML Properties, and then on the Image tab add alternative text that describes what the image is all about. Screen readers can then read out loud the alternative text.
- **Sounds**—You can even insert sounds that the reader can listen to, thus enhancing his or her understanding of the printed information.

As you prepare your documents, consider the entire audience. What can you do to make your documents more accessible? With WordPerfect, it's relatively easy.

TROUBLESHOOTING

CHECKING LINKS

I clicked a hyperlink to a Web site and my browser starts, but it won't display the Web site.

This could be one of several problems. Can you go to any site at all in your browser? If so, check the URL in the WordPerfect hyperlink to make sure it's typed correctly, including upper- and lowercase. If you can't reach other sites in your browser, make sure you're connected to the Internet (for example, that you've established a dial-up connection if you're not connected directly to the Internet).

Some companies set up firewalls to prevent others from accessing company networks. These firewalls also sometimes prevent employees from accessing anything beyond the company networks. If this seems to be the case, consult with your computer support department about possible solutions.

Getting Wired

Why can't I hear any sound files on my computer?

Although it is quite unusual these days, some computers do not have the necessary hardware installed to enable you to record sound files. You must have a sound card, a microphone, and speakers—in addition to the necessary software—to make them work.

If you do have the necessary hardware and software, and assuming the wires are all connected properly, have you before heard sounds, but now you can't? It might seem obvious, but check to make sure the Windows volume control hasn't been turned down, or off. Click the Sound (speaker) icon on the taskbar and make sure Mute is unchecked and that the volume is not all the way down. You can also double-click the speaker icon to open the Master Volume dialog box.

Finally, some speaker systems use power from the computer, or from batteries. If you turn on the power without batteries installed, the speakers actually turn off the sound. Try turning off the power.

Installing Sound and Video Drivers

I've got a video file linked properly, but it won't play.

Not everyone installs the necessary video players and drivers when they set up their Windows system. Further, some video formats require special players (for example, .mov files require the QuickTime player for Windows from Apple). Make sure all necessary drivers and players are installed.

Is the Right Switch On?

I have all the right hardware, but I still can't record sound files.

Some microphones have switches you can use to turn them on and off. Some also have switches that adapt the microphone to different types of sound cards. Make sure your switch settings are correct for the type of microphone and sound card you are using.

You should also check Windows's microphone settings. Double-click the speaker icon on the task bar to open the Master Volume dialog box and make sure the Microphone is not muted or turned all the way down.

Which Video Player?

When I play .avi files, everything works as you describe it. But if I try to play video files from my digital camera, a different player comes up.

The Windows Media Player typically works with .avi files because that is the standard Windows video format. Other formats, such as QuickTime (.mov) or MPEG (.mpg), use the standalone player that's associated with that file type. Players include Windows Media Player, WinAmp, Real Player, and others. As long as the video plays, be happy! Don't worry about which player is doing the work.

PART VII

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CHAPTER 18

Building Documents with Templates

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USING WORDPERFECT'S TEMPLATES

Whether you realize it or not, you use a template every time you create a new document. The wp13us.wpt template (for the U.S. version of WordPerfect) is the default template, and it contains all the default settings for new documents. Although the default template is blank except for the initial settings, a typical template is like a fill-in-the-blanks document. It contains the formatting, layout, and standard blocks of text—all you have to do is provide the content. Voilà! A document is created, ready to print, fax, or e-mail.

WordPerfect X3 ships with more than 20 built-in templates and more are available online. You might not have to create your own for quite a while, if ever. When you do venture out and create your own template, you'll be able to use any of the existing templates as a model, so all you have to do is make minor adjustments. In just a few minutes, you can even turn your own documents into templates.

NOTE

NEW

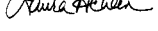
WordPerfect Office X3 includes a new product, called WordPerfect OfficeReady, designed to make it easier than ever to organize and access templates. It comes with 40 new templates that can be used in WordPerfect, Quattro Pro, and Presentations. It's called a "browser" because you can navigate through the template categories and display a high-resolution preview of the template in a nice big window.

It's a separate program, so you start it from an icon on the desktop (if you have one), or from the Start menu. To use the Start menu, choose Start, (All) Programs, WordPerfect Office Ready, Start WordPerfect OfficeReady. There is a user guide available (choose Help, Table of Contents) to get you started. Additional templates packages are available online at `www.wordperfect.com/templates`.

CHOOSING A PROJECT TEMPLATE

WordPerfect templates are also referred to as "project templates" because PerfectExpert projects act as the "front end" for the templates. Most of the templates have a corresponding PerfectExpert project that guides you through the process of filling in the template. Rather than open a template just as you would any other document, you select the project that you want to work on. The template is opened in the document window, and the PerfectExpert panel opens on the left side of the screen. You simply click the project buttons and choose from a list of options to alter the style, add other elements, and fill in the important text.

TIP FROM



The PerfectExpert is a powerful ally. When your users don't want to learn the ins and outs of WordPerfect just to create standard documents, it can be your best friend. The easiest way to include the PerfectExpert in custom templates is to base your custom template on an existing WordPerfect project.

To create a new document based on a WordPerfect template, choose File, New from Project (or press Ctrl+Shift+N). The PerfectExpert dialog box appears (see Figure 18.1). If necessary, click the Create New tab. Scroll through the list of projects, and then double-click the one you want to run.

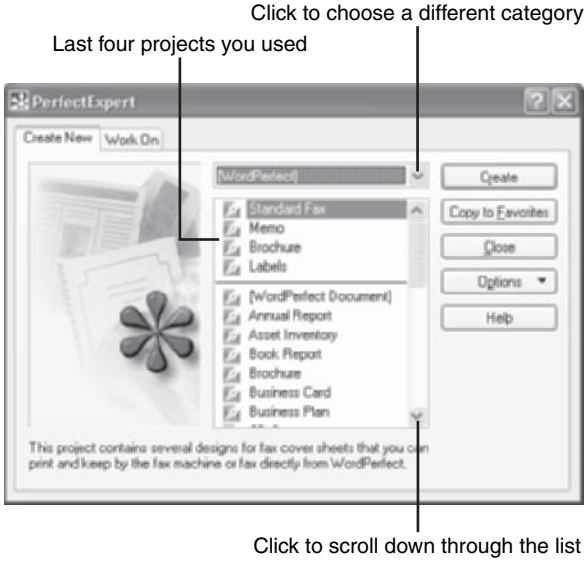


Figure 18.1
In the PerfectExpert dialog box, you can choose the project template you want to use to create a document.

If you get an error message when you try to open a project template, see "Missing or Damaged Template Files" in the Troubleshooting section at the end of this chapter.

If you don't see the project you want, click the category drop-down list arrow at the top of the project template list and choose another category. Select [WordPerfect] for a list of all the templates that are installed on your system. Keep in mind that the selection of templates that comes with WordPerfect X3 is much smaller than with previous versions. There are lots of theories as to why this was done, but the prevailing opinion is that Corel wanted to drive traffic to the OfficeReady Web site so that as additional templates packages are developed, they can be posted for purchase and download.

NOTE

To those of you who have upgraded from a previous version of WordPerfect, the selection of templates in WordPerfect X3 may seem sorely lacking. Granted, you can download more, but what about the templates that you used in a previous version? Can you use those? See the section titled "Using Templates from Earlier Versions of WordPerfect" at the end of this chapter.

CAUTION

> Some of WordPerfect's templates require personal information. If you haven't filled that in yet, you'll be prompted for it the first time you open a project template that uses the personal information. Skip down to the section "Filling In Personal Information," later in this chapter, and take care of that before you move on.

Before the project starts, you might see a PerfectScript macros message box (see Figure 18.2) that explains there are macros in the document and if you don't know the source of the document, you might want to disable the macros.

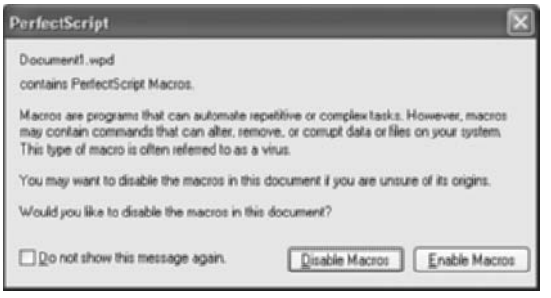


Figure 18.2
The PerfectScript message box gives you an opportunity to disable the macros in an unfamiliar template.

If you're using one of the templates that shipped with WordPerfect, or a template from a trusted source, you should choose to enable the macros. However, if you are unsure of the source, it's best to disable the macros. Granted, the results won't be the same, but it's better safe than sorry. At all costs, resist the urge to enable the check box that turns off the PerfectScript macros message box. In the fight against computer viruses, the capability to disable macros in a document is a fundamental tool. Turning off this message box will remove your capability to choose to disable or enable the PerfectScript macros.

If you accidentally turn off this message and you want to get it back, see "Re-enabling the PerfectScript Message" in the Troubleshooting section at the end of this chapter.

When you open a template, the PerfectExpert panel opens next to the template (see Figure 18.3). The buttons in the PerfectExpert panel give you options for customizing the template by choosing from the available variations.

Now you can start building the document by clicking the buttons in the PerfectExpert panel. For example, in the Standard Fax project, click the Fill in Heading Info button to open the Fax Cover Sheet Heading dialog box, where you can type all the To and From information (see Figure 18.4). Remove the check mark next to any item that you don't want on the fax cover sheet. Click the drop-down list arrows to choose items that you've already used in these fields. Otherwise, type the information in the text boxes.

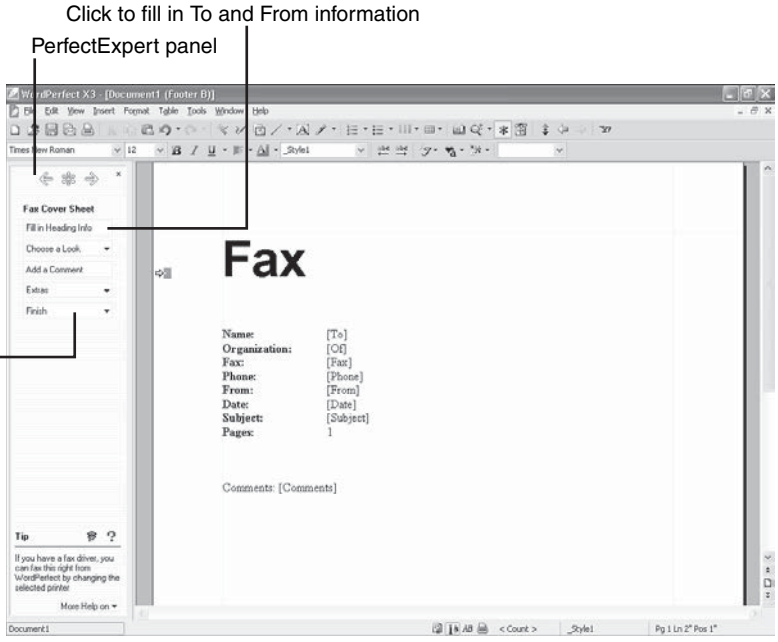


Figure 18.3
PerfectExpert projects incorporate templates and PerfectExpert ask-and-you-shall-receive formatting to automate many aspects of document production.

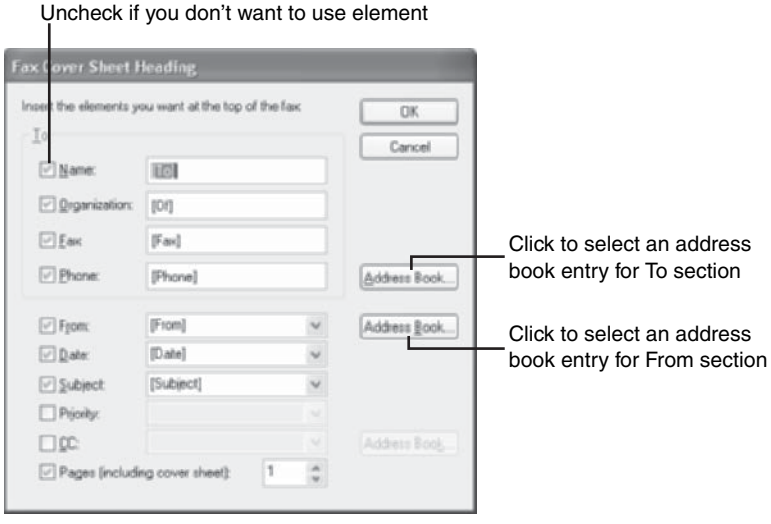


Figure 18.4
After you type the information in the Fax Cover Sheet Heading dialog box, WordPerfect inserts it in the appropriate places in the template.

Click the top Address Book button to fill in information from an Address Book entry in the recipient's section. Click the bottom Address Book button to fill in information in the sender's section. Click OK when you're done. The information is inserted into the template, and you're ready to continue creating the document.

FILLING IN PERSONAL INFORMATION

A good number of project templates require personal information (such as a name, company, address, and fax number), which you can type in once and have WordPerfect insert for you whenever it's necessary. If this information hasn't been created yet, you are prompted for it when you open a template that uses it (see Figure 18.5).

Figure 18.5
If you haven't filled in the personal information, you are prompted for it the first time you open a project template that uses it.

When you click OK, the Address Book dialog box opens with a list of available address books (see Figure 18.6). You need to select an address book entry that contains the personal information. Click the book with your personal information, select the entry in the list, and then click Insert. That's it—you're in.

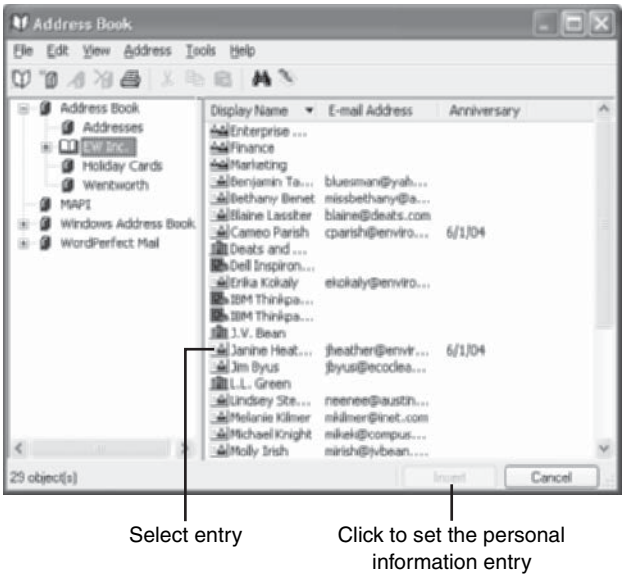


Figure 18.6
The list of Address Books in the Address Book dialog box varies depending on how your system is set up.

If you haven't created your own entry, click the Create a New Address Entry button on the toolbar. In the New Entry dialog box, select the kind of entry you want to create, and then click OK. The Properties dialog box for that kind of entry appears.

When you finish, choose OK to get back to the template. Now you can start building the document. If you like, skip back to the text following Figure 18.3 for a quick review of how to use the fax cover sheet project template.

➔ For more information on the Address Book feature, **see** "Working with the Address Book," **p. 538**.

EDITING PERSONAL INFORMATION

When you select a personal information entry in an Address Book, the entry becomes the default for all the templates. In many offices, computers are shared, so users need to select their own personal information entry in an address book.

To select a different personal information entry, open the PerfectExpert dialog box by clicking File, New from Project (or by pressing Ctrl+Shift+N), and then choose Options, Personal Information. A message box appears and identifies the current personal information entry (see Figure 18.7). Click OK to open the Address Book dialog box, where you can select another personal information entry.

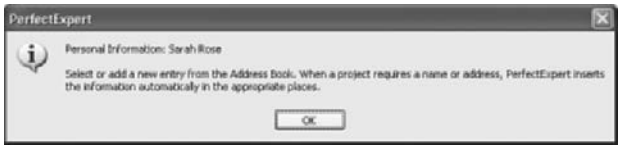


Figure 18.7
The personal information can be changed each time a different user uses the computer.

Get More Templates in a Free Download

Beginning with the release of WordPerfect 10, the number of templates that are included with the program was reduced. Corel announced that it would be making additional templates and projects available in a free download. These templates and projects can be downloaded from `http://www.officecommunity.com/AppLogic+FTContentServer.html` in the Download Gallery section and from Corel's ftp site at `ftp://ftp.corel.com/pub/WordPerfect/wpwin/10/english/templates`. Although the templates were written for WordPerfect 10, they will work just fine in WordPerfect X3. Simply copy these files into the template folder as specified in Tools, Settings, Files, Template. Choose File, New from Project, Options, Refresh Projects. Now, select the Custom WP Templates category to display the new templates.

The files on the FTP site are in an uncompressed format, so you need to download both the WPT and AST files in each folder (category). There is a README file in each folder with instructions for installing. There is also a thumbnail folder in each category containing a GIF file that will show you what each created project form might look like. To download the complete collection all at once, scroll down to the WP 10 Temp.zip file and download it to your computer.

CUSTOMIZING WORDPERFECT'S TEMPLATES

Every new document you create is based on the default template, which contains all the default settings. Some of these settings are listed in Table 1.1 in Chapter 1, "Getting Comfortable with WordPerfect." This template can be customized to suit specific

requirements. For example, if you want 1.5-inch margins, specific tab settings, and widow/orphan protection always on, you can make these changes to the default template so that they are in place for all new documents.

WordPerfect's project templates are designed so that you can use them right away. They are generic enough to work in most situations, especially when time is more important than personalization. However, when you're ready to customize the templates, you can revise a template as easily as you revise any other document. It is especially important that you back up the original template before you start revising so that if something goes wrong, you can always revert to the original.

EDITING THE DEFAULT TEMPLATE

If you routinely use settings other than the defaults, you can place these settings in the default template. The next time you create a new document, the new default settings will be in place. The default template contains a lot more than initial settings. It contains the majority of your customization efforts (such as QuickWords, custom toolbars, menus, and keyboards), so it is particularly important that you make a backup copy of the file before you make changes.

Before you make a move, search for the file—wp13us.wpt—for the U.S. version. Change the U.S. to the two-letter abbreviation for your language and you should be good to go. After you find the file, rename it to wp13usold. If the changes that you make to the default template cause any problems, you can revert to the original default template by renaming or deleting the new template and renaming the old template to its original filename. In other words, rename wp13us.wpt to wp13usbad.wpt, and then wp13usold.wpt to wp13us.wpt.

Editing the default template is a little tricky. You don't click on the WordPerfect Document entry in the list of projects and choose Options, Edit WP Template, as you might think. You have to select the template file from the list of custom templates instead. I like to think that WordPerfect is designed this way to avoid accidental modifications—not just to confuse me.

Follow these steps to edit the default template:

1. Choose File, New from Project. If necessary, click the Create New tab.
2. Click the category drop-down list arrow and choose the Custom WP Templates category. By default, there are two files in this folder: the default template and the QuickWords file (see Figure 18.8).
3. Select Create a Blank Document from the list.
4. Choose Options, Edit WP Template. The template opens in a document window, and the Template toolbar is displayed on top of the property bar (see Figure 18.9).

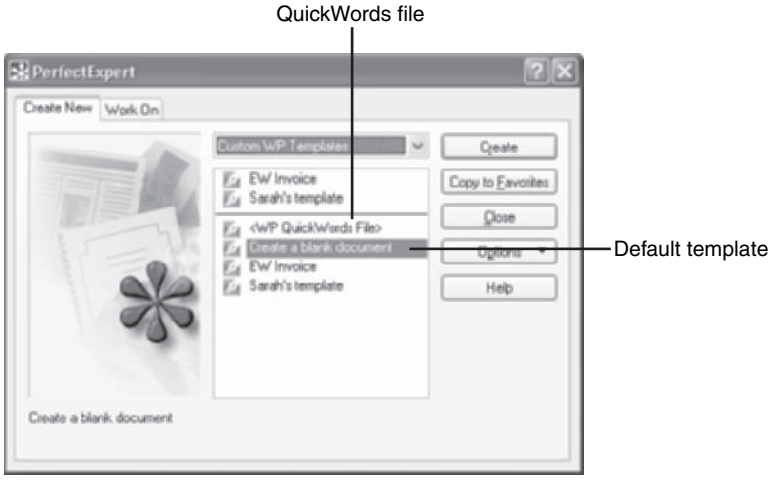


Figure 18.8
The Custom WP Templates category contains the default template, the QuickWords template, and any custom templates you create.

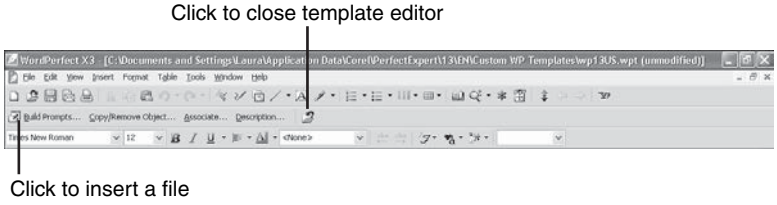


Figure 18.9
When you edit a template, the Template toolbar is added to the top of your screen.

CAUTION

> Is the Edit WP Template option grayed out? If you select the WordPerfect Document entry in the list, and then click Options, the Edit WP Template option is grayed out because you can't edit the default template this way. Click the category drop-down list arrow and select Custom WP Templates. Select Create a Blank Document, and then choose Options, Edit WP Template.

5. Turn on Reveal Codes and double-click the Open Style: DocumentStyle code at the top of the document. This takes you to the Styles Editor dialog box where you can use the menus in the dialog box to insert formatting codes into the Open Style:DocumentStyle code.
6. Make the necessary adjustments to the default template. Bear in mind that your changes will be applied to every new document from here on out, so be careful about the type of formatting codes and text you include.
7. When you're finished, choose Close to close the Styles Editor, click the Close button to close the Template Editor, and then choose Yes to save the template.

NOTE

Step #5 is an optional step. You can edit the default template without editing the Open Style:DocumentStyle code. The problem with skipping step 5 is that the formatting codes that you insert into the default template will be placed after the DocumentStyle code. The next time you create a new document, the insertion point will be positioned between the DocumentStyle code and the new codes that you inserted. As you begin to type, the codes that you inserted will be pushed to the right, which puts them after the text, so they won't affect the text you type in. The only solution to this is to remember to turn on Reveal Codes and move the insertion point after the codes every time you create a new document. Or, you can perform step 5 and place the formatting codes inside the DocumentStyle code, which is always the first code in a document (you can't move in front of it). With the codes safely inside of the DocumentStyle code, they will affect any text that you insert into the document.

TIP FROM

There is a great shortcut for editing the default template. Turn on Reveal Codes and locate the Open Style: DocumentStyle code at the top of the document. Double-click the code to open the Styles Editor. Make the necessary changes and then place a check in the Use As Default check box. Choose OK; then, confirm whether or not you want to save your changes to the default template.

TIP FROM

By default, any new styles you create are stored with the particular document. If you want to be able to use those styles with other documents, you need to save the new styles to the default template, which is available to all new documents. See the section "Saving Styles" in Chapter 9, "Formatting with Styles," for more information.

NOTE

The default template folder (specified in File Settings) is where the default template is stored. Any custom templates that you create are also saved to this folder. The templates that ship with WordPerfect are stored in a different location. They are copied to the \program files\wordperfect office x3\languages\en\template folder (the "en" varies depending on the language version of WordPerfect).

BACKING UP TEMPLATES BEFORE MAKING REVISIONS

You should always make backup copies of your templates before you edit them. If something goes wrong, you can revert to the original copy and start over.

In the PerfectExpert dialog box, right-click the template that you want to revise. Choose Project Properties to display the Modify a Project dialog box (see Figure 18.10). The Command Line list box has the name of the folder and the name of the template file. Click in the text box, and then press End to move to the end of the entry. Scribble down the name of the file.

In the Open File dialog box, move to the the \program files\wordperfect office x3\languages\en\template folder. There are two types of files here. Template files are shown as WordPerfect X3 Documents; project files are shown as AST Files. Right-click the template file, choose Rename, and then type ***filename-old*** as the new filename. For example, the fax template filename would now be fax-old.

Figure 18.10
The Modify a Project dialog box has the name of the template file and the name of the project file for a selected project template.

REVISING WORDPERFECT TEMPLATES

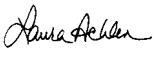
Call me lazy, but adding my company logo was the full extent of my template customizing. If you're more ambitious, you might want to change the headings, select a different font, remove elements that you won't use, or modify the formulas used to calculate figures in tables.

Follow these steps to revise one of WordPerfect's templates:

1. Choose File, New from Project.
2. Select the template you want to revise.
3. Choose Options, Edit WP Template. The template is opened into the document window, and the Template toolbar is turned on (see Figure 18.11).
4. Using the same techniques that you use on a regular WordPerfect document, revise the template.

➔ For more information on adding template prompts that help you remember what you're supposed to be typing, **see** "Using Prompt Builder," **p. 489**.

TIP FROM



You can change the name that appears in the list of project templates. While editing a template, click the Description button on the Template toolbar, and then type a new name in the Template Description dialog box. Keep it short, so that the name doesn't extend too far over in the list.

5. Click the Close button when you are through. When you are prompted to save your changes, click Yes.

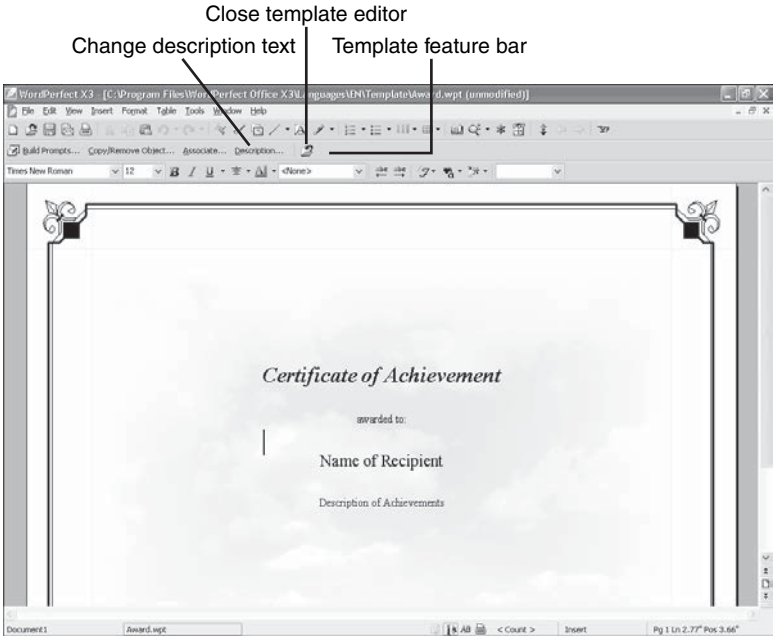


Figure 18.11
You can edit a template as easily as you edit a regular document.

It's better to add functionality to templates than to take it out. Your changes aren't written in stone, so if you decide later to pull something out of a template, it will take only a minute. If you remove functionality, however, it might take hours to re-create (and that's assuming that you have the expertise to do it) .

NOTE

> The modifications that you make in a template affect only new documents you create with the template; the documents based on the template that you've already created won't be affected at all.

CREATING NEW TEMPLATES

Creating a template from scratch is definitely a last resort. Two other options are much faster. First, you can save an existing document as a template. You're bound to have at least a couple of "form" documents that you use over and over. Fax cover sheets come to mind, but so do supply requests, time sheets, network maintenance bulletins, expense reports, newsletters, equipment checkout sheets, and so on.

Second, you can revise an existing template, and then save your changes as a new template. You can use as your starting point one of your own templates or one of the templates that came with WordPerfect, and then just make the necessary adjustments. After all, a lot of effort goes into the development of a template—it would be a shame to let that go to waste.

BASING A TEMPLATE ON AN EXISTING DOCUMENT

Basing a template on an existing document is the best option for building a library of templates that you can start using right away. Think of documents that you use often in which some of the information stays the same (such as memo headings and the sender's name) and some of the information changes (such as the recipient, date, subject, and content of the memo). Strip out the information that changes, leave the information that doesn't, and voilà—you've got yourself a template.

NOTE

> This might seem like a complicated way to achieve the same result that you get by revising an existing document and saving it under a new name. But hang on for a second—there's more to it than that! Filling in a blank template is just the tip of the iceberg. You can build on the template later, adding automation features such as the capability to select information from an address book. Furthermore, system administrators can deploy templates with standardized styles, macros, toolbars, menus, and keyboards (you'll learn more about this later) .

Follow these steps to create a template from an existing document:

1. In a blank document, choose File, New from Project.
2. Choose Options, Create WP Template. A blank template opens in the document window, and the Template toolbar is displayed at the top of the screen.

3. Click the Insert File button (or choose Insert, File) to display the Insert File dialog box.
4. Select the filename for the existing document, and then choose Insert.
5. Strip out the variable text, and then make any other necessary revisions.

TIP FROM

> With a QuickMark, you can position the insertion point in a specific place when creating a new document based on a template. For example, you might want to jump to the fax number line in a fax cover sheet template so that the user can type the fax number as soon as the document opens. Before you save the template, click where you want the insertion point to be, and then press Ctrl+Shift+Q to set a QuickMark. To find the QuickMark later (as you fill in the template), press Ctrl+Q.

6. Click the Close button when you're finished.
7. Click Yes when you're asked whether you want to save the template. The Save Template dialog box appears (see Figure 18.12).

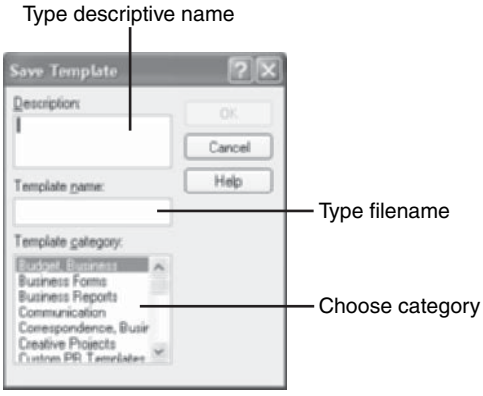


Figure 18.12
In the Save Template dialog box, you can type a description for the template and a name for the file, and then choose a category to store the template in.

8. In the Description text box, type a descriptive name to appear in the template list.
9. Type a filename in the Template Name text box. Don't type an extension—WordPerfect assigns the .wpt extension to templates so that they can be recognized as templates and not as documents.
10. Choose the category where you want the template stored in the Template Category list box.
11. Click OK to save and close the template.

If you can't find a template that you've just created in the list, see "My New Template Isn't Showing Up" in the Troubleshooting section at the end of this chapter.

After you've converted some of your documents to templates, you might want to consider how you can delegate document production by distributing the template. For example, attorneys aren't crazy about learning the ins and outs of WordPerfect just to create and revise their own documents. If a savvy legal secretary were to create a library of templates, and then copy them to an attorney's computer, that attorney could create some fairly sophisticated documents without ever taking a class or reading a book. As you'll see in later sections of this book, you can actually create an environment that shields the user from the intricacies of the software by providing customized styles, menus, keyboards, and toolbars.

TIP FROM

Laura Acklen

Templates cannot be password protected. If you need to password protect a template, you're better off saving it as a regular document and choosing Password Protect in the Save As dialog box.

BASING A TEMPLATE ON ANOTHER TEMPLATE

One of the most basic concepts of document production is saving time by sharing work products. You revise an existing document (yours or someone else's), and then save it as a new file. Everyone benefits from the time and energy that goes into creating documents.

This same concept carries over to templates. If the design you are looking for is similar to an existing template, by all means, edit that template, make the changes, and then save it as a new template.

To create a new template based on an existing template, follow these steps:

1. Choose File, New from Project.
2. Select the template you want to revise.
3. Choose Options, Edit WP Template. The template is opened into the document window, and the Template toolbar is turned on.
4. Choose File, Save As to open the Save Template dialog box (refer to Figure 18.12).

TIP FROM

I know you haven't made your changes yet, but I strongly recommend that you immediately save the template to a new name. If something happens while you're editing the template, the original is unharmed, so you have the option of starting over.

5. In the Description text box of the Save Template dialog box, type a new descriptive name to appear in the template list.
6. Type a filename in the Template Name text box. Don't type an extension—WordPerfect assigns the .wpt extension to templates so they can be recognized as templates and not as documents.
7. In the Template Category list box, choose the category where you want the template stored.
8. Click OK to save the template. Now, you are free to make changes to this template without fear of harming the original file.

WORKING WITH PROJECTS AND CATEGORIES

The same way files are organized into folders, templates are organized into categories. WordPerfect's projects are organized into predefined categories. You can create your own categories, and then move and copy templates into them. Let me give you an example: You might want to set up a category for a new or timid user's templates, and then point to that category so only a few templates show up in the list.

You have the following options for managing projects and categories:

- **Add projects to a category**—You can select the category in the drop-down list. Choose Options, Add Project, and then answer the questions. I'll come back to this later in the section that covers converting templates from older versions of WordPerfect.
- **Copy a project to another category**—You can select the project, and then choose Options, Copy Project. Choose the new category from the pop-up list.

- **Move a project to another category**—You can select the project, and then choose Options, Move Project. Choose a category from the pop-up list.
- **Delete projects you no longer use**—You can select a project, and then choose Options, Remove Project. Take a minute to review the Project Properties dialog box, and then click OK to confirm the removal (or bail out by clicking Cancel).

NOTE

The Remove Project command doesn't delete the template from the hard drive; it just removes the reference to that project from the projects.usr file, which is the "index" file for templates. If you want to remove the project entirely, you have to delete the file manually.

- **Create new categories**—You can create your own categories for projects and templates. Choose Options, Create Category, and then type the name of the category in the Display Name text box. Click OK.
- **Rename categories**—You can rename a category. Select the category in the drop-down list, and then choose Options, Rename Category. Type the new name in the Display Name text box, and then click OK.
- **Delete categories that you no longer use**—You can select the category in the drop-down list, and then choose Remove Category. Take a close look at the category name in the Display Name text box, and then confirm the deletion by clicking OK (or bail out by clicking Cancel).

TIP FROM

If you have temporary employees come in when things get busy, group together the templates that you want them to use and put them in their own category. Select that category in the drop-down list so only the templates that you want the temps to use are displayed in the list.

If you accidentally delete the wrong category and need to rebuild the projects.usr index file, see "My New Template Isn't Showing Up" in the Troubleshooting section at the end of this chapter.

COPYING OBJECTS FROM OTHER TEMPLATES

Template objects are features that can be embedded into a template. They include property bars, toolbars, menu bars, styles, keyboards, macros, XML components, and QuickWords. When you customize WordPerfect by adding buttons to the toolbar or creating styles and macros, you are creating objects that are stored in the default template.

Think about the WordPerfect expert at your firm. She created custom toolbars for the company's marketing materials. She created standard styles for formatting company correspondence. She customized the menus to remove unused features and to add features that are used often. She has customized WordPerfect in ways that you can only dream of.

Count yourself lucky if you have someone like this in your company, because you can take advantage of all her hard work by simply copying the objects into your default template.

Follow these steps to copy objects from another template:

1. Make a copy of the other template and give it a different name (such as sarah or wpexpert).
2. Copy the template to the default template folder specified in the File Settings dialog box (choose Tools, Settings, Files, and then click the Template tab).
3. Choose File, New from Project.

NOTE

> Keep in mind that while these steps describe how to copy objects into your default template, you can just as easily copy them into any other template.

4. Click the category drop-down list arrow and choose Custom WP Templates.
5. Select your default template Create a Blank Document in the list, and then choose Options, Edit WP Template.
6. Click the Copy/Remove Object button on the Template toolbar to display the Copy/Remove Template Objects dialog box (see Figure 18.13).

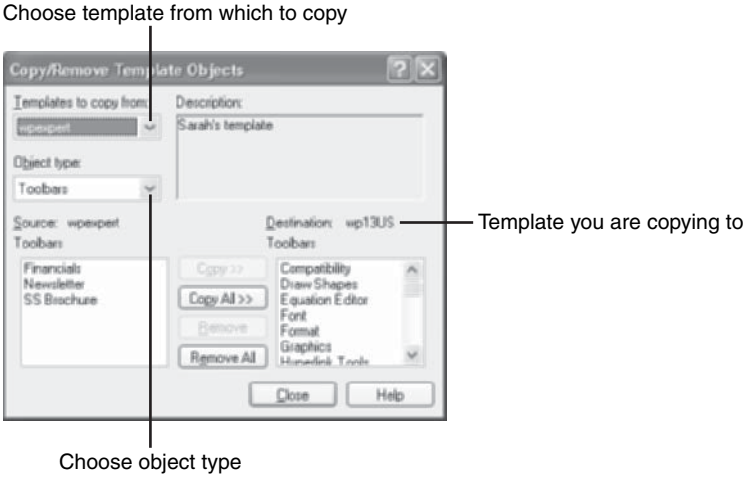


Figure 18.13
In the Copy/Remove Template Objects dialog box, you can copy an object from one template to another.

7. Click the Templates to Copy From drop-down list arrow and select the template that has the objects that you want to copy (for example, sarah or wpexpert). (This is the WordPerfect genius' template.)
8. Click the Object Type drop-down list arrow and choose the object you want to copy. Depending on which object you choose to copy, the Source list displays a list of those objects. For example, if you choose Menu Bars in the Object Type drop-down list, a list of available menu bars appears in the Source list box (see Figure 18.14).

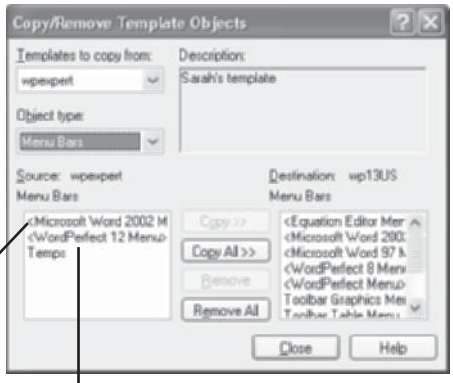


Figure 18.14
When you choose an object type, a list of items appears in the Source list box, where you can select and copy them to the other template.

9. Select the item you want to copy in the Source list box and click Copy. Or, you can click Copy All to copy all the items at once.
10. If the object names are identical, you get a message asking you to confirm the replacement. Click Yes.
11. Repeat steps 4 and 5 until you've copied all the objects that you want.
12. Choose Close.

18

TIP FROM

You can remove objects from a template as easily as you can add them. Follow the preceding steps, except in step 9, click Remove to delete the selected item or click Remove All to strip out all the items at once. Note that objects associated with the main document window cannot be removed.

TIP FROM

Toolbars, menus, and custom keyboards can all be copied from one template to another in the Customize Settings dialog box (which you get by choosing Tools, Settings, Customize). Click the Toolbars, Menus, or Keyboards tab, and then click Copy. Click the Template to Copy From drop-down list arrow and choose the template you want to copy from. Choose the item that you want to copy from the list box. Click the Template to Copy To drop-down list arrow and choose the template you want to copy to. Click Copy.

Template objects can be stored in the default template or the additional objects template. The additional objects template is a secondary default template. The name and location of the additional objects template is found in the Template tab of the File Settings dialog box. You can use the objects in this template along with, or in place of, the objects in the default template.

In a networked environment, a system administrator can implement company standards by customizing an additional objects template and keeping it on a network drive. Each user has his or her own default template on the local drive, so each is free to customize WordPerfect. As an added precaution, the additional objects template can be set up as read-only to prevent accidental modification.

Furthermore, if a network administrator wanted to distribute a set of templates through a company, he could copy those templates into an additional template folder and then set that folder's location at each workstation. Folders can be created within that additional template folder to organize the templates into categories. The last step would be to refresh the list of projects at each station so the new templates show up in the list. Choose File, New from Project, click the Options button, and then choose Refresh Projects.

USING PROMPT BUILDER

Let's say you're the WordPerfect expert in the company and it's your job to develop templates for distribution to the rest of the staff. The experience level of your co-workers varies widely—some employees understand how to fill in the blanks, and others don't.

The solution? Use Prompt Builder to create messages that ask users for information, and then plug that information into the template. It's as close as you can get to sitting right next to the users, explaining what they are supposed to do.

Follow these steps to insert prompts in a template:

1. In the PerfectExpert dialog box, select the template you are developing, and then choose Options, Edit WP Template.
2. Click where you want to place the information that the user types.
3. Click the Build Prompts button on the Template toolbar to display the Prompt Builder dialog box (see Figure 18.15).

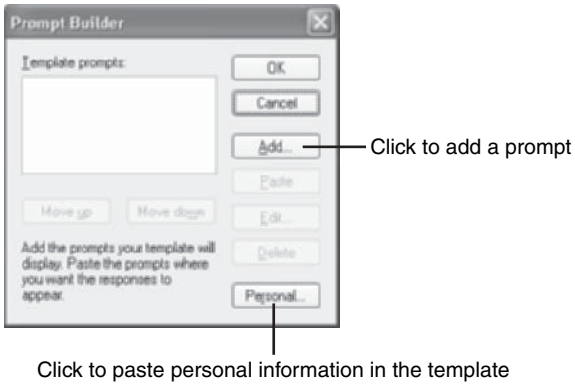


Figure 18.15
In the Prompt Builder dialog box, you can create messages that prompt the user for information.

4. Click Add to display the Add Template Prompt dialog box (see Figure 18.16).

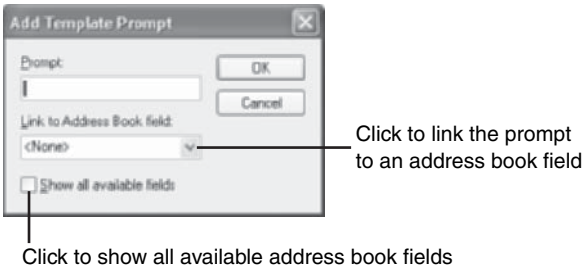


Figure 18.16
In the Add Template Prompt dialog box, you can type the prompt text and select an address book field to link the prompt to.

5. Type the message in the Prompt text box. You can type up to 160 characters, but you should try to keep it short (20 to 30 characters).
6. Click OK to add the prompt to the list in the Prompt Builder dialog box. Now that you've added the prompt to the list, you can paste it into the template.
7. Select the prompt in the Template Prompts list box, and then click Paste to insert it in the template. The prompt appears at the insertion point, with brackets around it (see Figure 18.17).

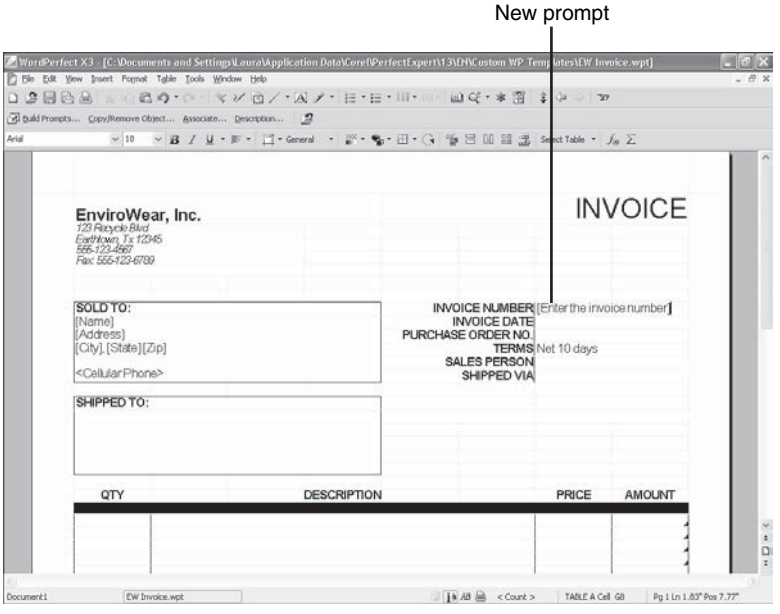


Figure 18.17
Using Prompt Builder, you can generate prompts that remind the user what to type.

When you open a template with prompts, the Template Information dialog box appears with a list of the prompts in the template (see Figure 18.18).

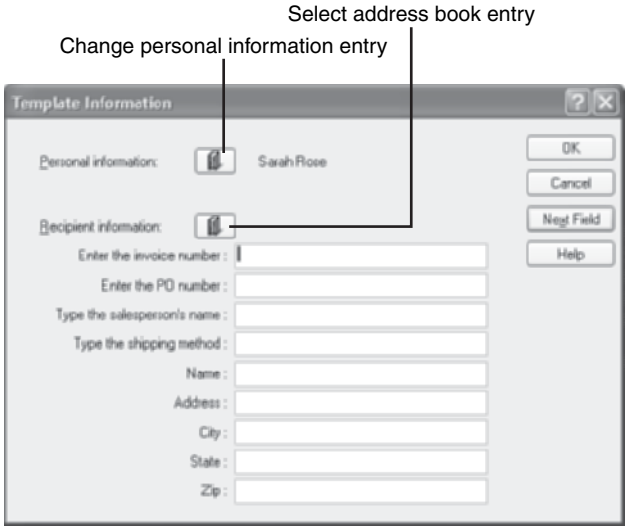


Figure 18.18
The Template Information dialog box contains text boxes for each of the prompts in a template.

WORKING WITH TEMPLATE PROMPTS

As you revise a template with prompts, you might have to move a few of them around. You might even decide to delete a section of the template, rendering some of the prompts obsolete. The key is to keep the template prompts and Prompt Builder prompts in sync. You can remove prompt text from a template, but you'll see that prompt displayed the next time you use the template if you don't remove the prompts from the Prompt Builder list.

Here are a few things to keep in mind as you work with the template prompts:

- **Moving prompts**—Make sure you select the brackets ([]) on each side of the prompt text, and then cut and paste the prompt.
- **Rearranging prompts in Prompt Builder**—When you run a template, you are prompted to fill in the information in the order in which the prompts appear in the Prompt Builder list (refer back to Figure 18.15). So, if you don't mind typing the ZIP Code before the name, leave them alone. Otherwise, arrange the prompts in the order that's easiest for you to fill them in. Select the prompt that you want to move, and then click Move Up or Move Down.
- **Deleting prompts**—After you've deleted the prompt text in the template, you have to delete the prompt in the Prompt Builder dialog box; otherwise, you'll still be prompted to type in the information, even though it isn't inserted anywhere. In the Prompt Builder dialog box, select the prompt, and then click Delete, Yes.
- **Editing prompts**—You can delete the old prompt text in the template. Select the prompt in Prompt Builder, and then choose Edit. Revise the prompt text and/or change the Link to Address Book field (you'll learn more about this in the next section). Reinsert the new prompt.

LINKING PROMPTS TO ADDRESS BOOK FIELDS

Your company can have five employees or 5,000 employees—in either case, the client information is the most valuable asset. Maintaining a centralized list of names, addresses, and phone numbers is essential, and with the WordPerfect and Outlook address books, it's easy to do. Using one of the address books on your system, you can insert client information directly into a template.

You still have to create a prompt for the information, but WordPerfect fills it in for you when you select an entry from an address book. Follow these steps to link a prompt to an address book field:

1. Edit the template, and then click where you want the address book information to appear.
2. Click Build Prompts. In Prompt Builder, click Add.
3. Type the prompt text in the Prompt text box.
4. Click the Link to Address Book Field drop-down list, and then select a field from the list (see Figure 18.19).

CAUTION

> If you don't see the field you want, click the drop-down list arrow again (to close the list). Place a check mark next to Show All Available Fields, and then click the Link to Address Book Field drop-down list arrow again.

5. Click OK, and then paste the prompt into the template.

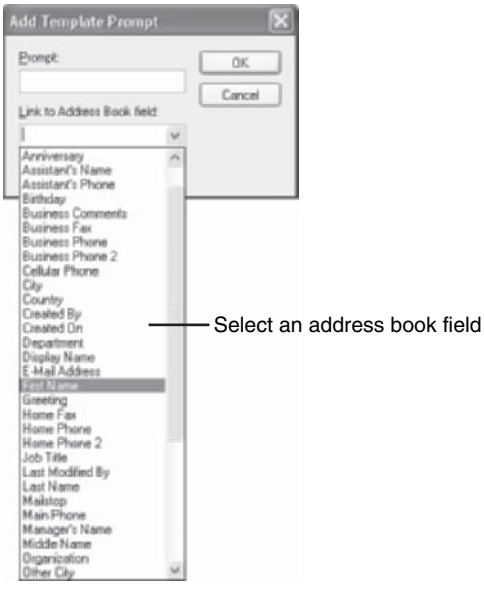


Figure 18.19
In the Add Template Prompt dialog box, you can link the prompt to an address book field.

When you run the template, the prompts appear in the Template Information dialog box (refer to Figure 18.18). Click the Address Book button to display the Address Book (or Outlook Address Book) dialog box, with a list of the Address Books on your system (refer back to Figure 18.6).

When you select an address book entry and choose Insert, WordPerfect displays a Format Address dialog box (see Figure 18.20).

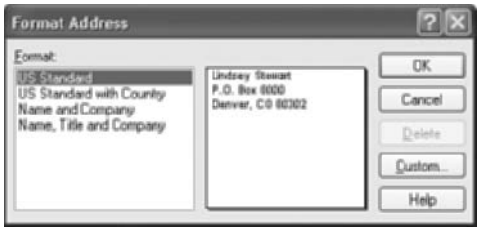


Figure 18.20
You can choose from one of the predefined address formats in the Format Address dialog box.

Select the address format that you want to use, and then click OK twice to plug the information into the prompts that you linked to address book fields (see Figure 18.21).

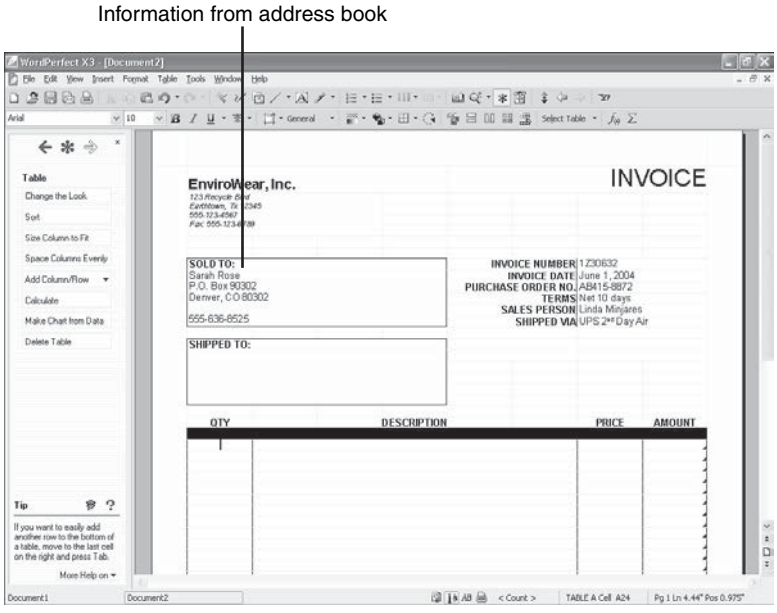


Figure 18.21
After you select an entry from an address book, WordPerfect plugs that information into the template, replacing the prompts.

If you're having trouble using fields from your Outlook address book in template prompts, see "My Outlook Address Book Fields Are Missing" in the Troubleshooting section at the end of this chapter.

INSERTING PERSONAL INFORMATION IN A TEMPLATE

Remember when you first used the Template feature and you had to select a personal information entry in the address book? Well, guess what? You can insert information from that entry into a template, too. For example, if you want a user's name to appear in a Salesperson or an Author prompt, you can insert a personal field for the person's name in the template.

To insert data from the personal information entry in the address book, click in the template where you want the information to appear. Open the Prompt Builder dialog box, and then click Personal. The Personal Fields dialog box appears (see Figure 18.22). Select a field, and then choose Paste.

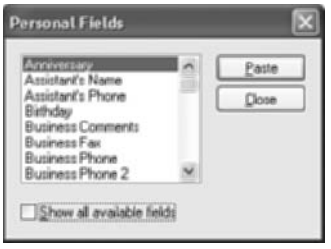


Figure 18.22
By using the Personal Fields dialog box, you can paste one of the personal information fields into the template.

The personal information prompt appears in angle brackets (<>), so it looks different from the other prompts, which appear in square brackets ([]). When you run the template, the information is inserted from the Address Book (see Figure 18.23).

NOTE

> You won't see the prompts you create for personal information in the Template Prompts list box of the Prompt Builder dialog box.

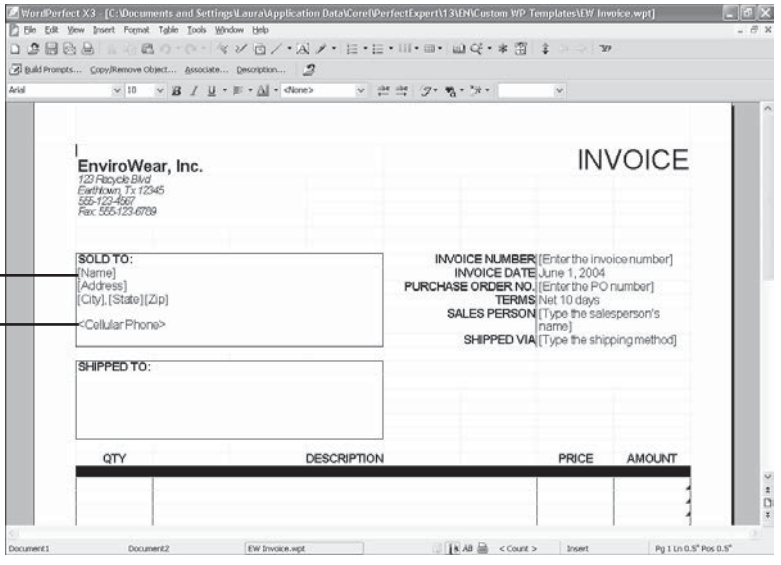


Figure 18.23
Personal information prompts are surrounded with angle brackets, and regular prompts are surrounded by square brackets.

CUSTOMIZING THE WORKING ENVIRONMENT

The toughest part of supporting computer users is catering to different levels of expertise. A manufacturing company, for example, might have a technician on the plant floor who needs to fill out production logs. Upstairs in the administrative offices, there is a temporary worker who has never worked with your company's documents before. Down the hall is the management team, which generates reams of reports, but doesn't seem too interested in learning the program.

If this is a typical day in your office, you've just found the perfect reason to implement templates. By using the Template feature and the PerfectExpert panel as your front end to WordPerfect, users can crank out documents without ever learning how to use a menu.

ASSOCIATING MENUS AND KEYBOARDS

As you saw in an earlier section, you can attach objects to templates so that they are available only when you are using that template. Rather than create a monster list of menus or keyboards, you can embed them into various templates. The same goes for macros—you can create macros and attach them to a template. From that point forward, they are template macros, so they don't even show up in the macros folder.

➔ If you are intrigued by the idea of embedding macros in templates to reduce macro clutter, **see** "Creating Template Macros," **p.575**.

Now let's take this one step further. You can create an association to menus and keyboards so that they show up only in certain editing modes. As you change modes, the menu or keyboard layout changes dynamically and automatically.

The different editing modes in WordPerfect are

Main (normal document window)	Graphics
Comments	Headers
Endnotes	Outline
Equation Editor	Tables
Footers	Watermark
Footnote	

Follow these steps to create an association to a feature:

1. Edit the template to open it in the editing window and display the Template feature bar.
2. Click Associate on the Template feature bar to display the Associate dialog box (see Figure 18.24).
3. If necessary, choose Features.
4. Choose the editing mode you want to associate (Headers, Tables, Graphics, and so on).
5. Click the Menus or Keyboards drop-down list arrow and choose the menu (or keyboard) that you want to associate with this editing mode. Alternatively, choose No Association in the Menus or Keyboard drop-down lists to remove the association.

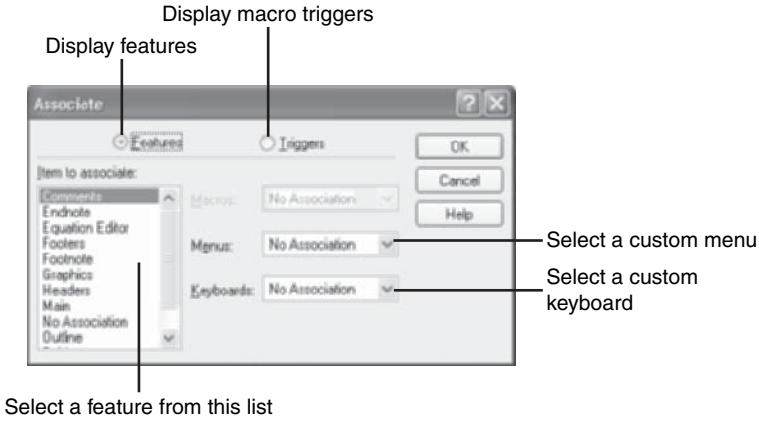


Figure 18.24
In the Associate dialog box, you can associate a menu or a keyboard to a particular feature's editing mode.

6. Repeat steps 4 and 5 to define other associations.
7. Click OK when you're finished.

CAUTION

> If the menu or keyboard that you want to use doesn't appear in the list, you haven't attached it to this template yet. Cancel out of the Associate dialog box, and then either create the menu or keyboard or copy it from another template. See the section "Copying Objects from Other Templates," earlier in this chapter, for more information.

ASSOCIATING MACROS TO TRIGGERS

Macros work a little differently. Table 18.1 lists the macro triggers and what they do.

For example, say you have set up a shared workstation for paralegals to use. These systems have templates to generate standard legal documents. In each template, you associate a macro with printing, so when the user sends a document to the printer, this macro runs and prompts for the client number. After this information is typed in (and plugged into a resource usage log so you can bill the printing costs back to the client), the document is printed.

You could also associate a macro with opening a template. This macro would prompt for the paralegal's name and the client number, so the paralegal's time spent creating and printing the document could be billed back to the client.

TABLE 18.1 MACRO TRIGGERS

Macro Trigger	What It Does
Post Close	Runs in the active window after you close a window.
Post New	Runs after you open a new document by using File, New.
Post Open	Runs after you open a document by using File, Open.
Post Print	Runs after you send a job to the printer.
Post Startup	Runs when you start WordPerfect. This macro must be associated with the default template to work properly.
Post Switch Doc	Runs in the active window after you switch from another window.
Post Tables	Runs after you create a table definition, but before you type anything.
Pre Close	Runs before you close the window by choosing File, Close.
Pre New	Runs before you open a new document by using File, New.
Pre Open	Runs before you open another document by using File, Open.
Pre Print	Runs after you choose File, Print, but before the document is sent to the printer.
Pre Switch Doc	Runs in the active window before you switch to another window.
Pre Tables	Runs after you create a table (by using Insert, Table), but before the table definition is created in the document.

Follow these steps to associate a macro with one of these triggers:

1. Edit the template to open it in the editing window and display the Template feature bar.
2. Click Associate on the Template feature bar to display the Associate dialog box (refer back to Figure 18.24).
3. Click the Triggers option.
4. In the Item to Associate list box, select the trigger you want to use (see Figure 18.25).

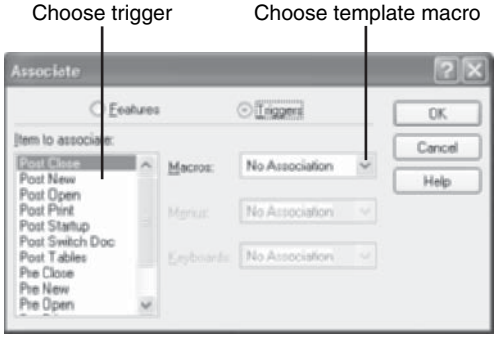


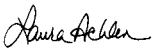
Figure 18.25
In the Associate dialog box, you can assign a template macro to an event or a trigger.

5. Click the Macros drop-down list arrow and choose the macro you want to associate with this trigger. Alternatively, choose No Association to remove a trigger association.
6. Repeat steps 4 and 5 to define the other trigger associations.
7. Click OK when you're done.

CAUTION

The macro you want to associate to a trigger must already be a part of the template, or it won't appear in the Macros list. If you don't see the macro you want, cancel out of the Associate dialog box, and then create the macro and copy it to the template. See the section "Copying Objects from Other Templates" earlier in this chapter for more information.

TIP FROM



Template macros increase the size of the file, so try to avoid embedding large macros in your templates. The larger the template, the slower it runs.

NOTE

If you've created a template from scratch and you've added prompts to it, you're probably wondering how to display the Template Information dialog box, where users can fill in the prompts and have WordPerfect insert the information into the template. (You might want to refer to Figure 18.19 to refresh your memory.)

The answer is the `TemplateFill()` macro command, which starts the DoFiller feature. You can create a simple macro with just this command, and then associate it with the Post New trigger. If you already have a template macro associated with the Post New trigger, you can edit that macro and add the command to the macro. Choose Tools, Template Macro, Edit to edit the template macro.

USING TEMPLATES FROM EARLIER VERSIONS OF WORDPERFECT

Heavy-duty template users don't want to hear that they can't use their existing templates in the newest release of WordPerfect. And they don't have to. The templates that you created in previous versions can be used in WordPerfect X3. Some might have to be converted, and those using address book fields might need some fine-tuning, but for the most part, your hard work won't go down the drain.

First, you need to copy the templates to the template folder where the WordPerfect X3 templates are stored (\program files\wordperfect office X3\languages\en\template), or the Custom WP Template folder that is specified in the File Settings dialog box (choose Tools, Settings, File, and then click the Template tab). You can create subfolders in either of the template folders to organize the templates. These folder names appear as categories in the

drop-down list (see Figure 18.26). This naming system helps keep the older templates separate from the templates that shipped with WordPerfect X3.

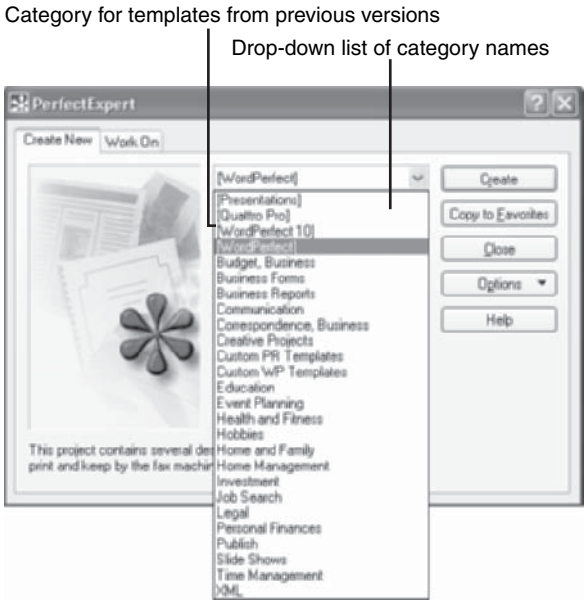


Figure 18.26
Subfolders of the Templates folder appear as categories in the list.

After you've copied the templates over, follow these steps to prepare templates for use in WordPerfect X3:

1. Choose File, New from Project.
2. Select Options, Add Project. This launches an expert to guide you through the process of adding a new project template (see Figure 18.27).
3. The default selection is to add an existing project, so choose Next.

Figure 18.27
There is an Add Projects Expert to guide you through the process of adding a new project template to the list.

4. Browse for the AST file that corresponds to the desired project template. The filename will be the same as the template—only the extension is different. WordPerfect 7 or earlier templates might not have an associated AST file. If this is the case, choose Back, choose Add Another Document, and then choose Next to proceed.
5. After you select the AST file, you might be able to choose Finish to add the project. Otherwise, you will be prompted to select the corresponding template (WPT) file. Now, you can choose Finish.

At this point, you've associated the template to the PerfectExpert, but you still need to debug, recompile, and save, if necessary, any existing macro commands within the template.

Follow these steps to recompile the macro commands in a template:

1. Choose File, New from Project.
2. Select the newly associated template.
3. Choose Options, Edit WP Template. Click Yes to convert the template. Click Yes to overwrite the original template.
4. Choose Tools, Template Macro Edit. You can now make your changes, save, and recompile the macro commands within the template.

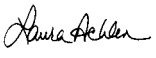
➔ For more information on debugging, saving, and recompiling macros, **see** "Using Macros from Previous Versions of WordPerfect," **p. 588**.

As you have seen, you can convert a template by editing it and then saving your changes. Even if you haven't made any changes, this triggers the tconvert.wcm macro that converts the template. You can also run the tconvert.wcm macro manually by choosing Tools, Macro, Play. Scroll down, and then double-click tconvert. When the Convert Template dialog box appears, type the name of the template or click the Files icon to browse for the file. Click OK to convert the template, and then save the template.

➔ To learn more about the macros that come with WordPerfect, **see** "Running the Shipping Macros," **p. 570**.

If you try to convert an old template and get the error message tconvert.wcm not found, see "`tconvert.wcm` Not Found" in the Troubleshooting section at the end of this chapter.

TIP FROM



You will run into problems using templates with links to address book fields that no longer exist. If the older version of WordPerfect is still available, edit the template in that version and remove all the links to address book fields. Next, edit the template in WordPerfect X3 and reselect the address book fields. Otherwise, edit the template in WordPerfect X3, delete the prompts, and then re-create them.

TROUBLESHOOTING

MISSING OR DAMAGED TEMPLATE FILES

When I choose File, New from Project and double-click a project, the following error message appears: <filename>*.wpt cannot be opened or retrieved: the file cannot be found.*

The template file associated with this project is missing or damaged. You can get a fresh copy of this template file from the WordPerfect Office X3 CD. Keep in mind that when you reinstall the PerfectExpert Projects, any changes that you made to the those templates will be lost (unless, of course, you saved your changes with a new template name).

In previous versions, you were able to restore an individual template file by copying it over from the WordPerfect Office CD. Sadly, the installation program had to be redesigned in order to run on the newer Windows operating systems, and so files are now stored in "cabinets." To get a fresh copy of a template file, you'll have to do a repair install, which fixes missing or corrupt files, shortcuts, and Registry entries.

Choose Start, Control Panel, Add or Remove Programs. Scroll down and select the WordPerfect Office X3 entry. Click the Change button to start the Installation Wizard. Choose Repair Installation Errors in the Program. Enable the Detect & Repair Errors in the Program option. Choose Begin. Follow the prompts. Click Finish to close the installation wizard.

After you've reinstalled the templates, use the Refresh command to update the project list. In the PerfectExpert dialog box, choose Options, Refresh Projects, and then click OK.

If you continue to get the message, it could be that the template list doesn't accurately reflect what is actually installed on your system. This can sometimes happen when you upgrade from a previous version. You can rebuild the projects list by renaming and re-creating the projects.usr file.

Exit WordPerfect and then click Start, Search, All files and Folders in Windows XP/2000; click Start, Find, Files or Folders in Windows 98. Type **`projects.usr`** in the Filename text box. If necessary, scroll down and choose a drive to search in the Look In list box. Click Search or Find Now. When the file appears in the list, right-click it and then choose Rename. Type **`projects.old`** and then press Enter.

Start WordPerfect, and choose File, New from Project. There will be a short pause while the projects.usr file is re-created. The new list should now reflect the projects that are actually installed.

NOTE

> If a project file is missing or damaged, you might still get the PerfectExpert panel when you open the template, but the buttons in the panel are for creating a generic document. They are not the buttons that control the template. You'll need to do a quick repair install to repair (or replace) the template files.

Re-enabling the PerfectScript Message

I didn't mean to, but I accidentally checked the box to turn off the PerfectScript message box that asks if you want to disable macros in the document or not. Is there any way to turn that message back on?

Absolutely! It involves editing the Registry though, so if you aren't comfortable doing this, you should find someone who is. Offer to buy them lunch if they will make this change for you.

Before you get started, make sure you back up the Registry. That way, if something goes awry, you have a backup copy to fall back on.

Using Regedit or Regedt32, search for the HideDialogs key for WordPerfect 13. Change the value from 2 to 0 (zero).

My New Template Isn't Showing Up

I just created and saved a new template, but now I can't find it in the list. Where did the template get saved?

When you save a template, you type a description that appears in the project list and a template filename. The last step is to select a category where the template is saved. Because you don't have to type anything (you select a category from a drop-down list), it's easy to overlook that last step.

If you don't choose a category, WordPerfect stores the new template in the first category in the list: Budget, Business. In the PerfectExpert dialog box, click the category drop-down list arrow and then choose Budget, Business. Select the new template from this list, choose Options, Move Project, and select the proper category from the pop-up list.

If the new template doesn't appear in the Budget, Business category (or in the other categories), you need to rebuild the project index, which contains a list of all the templates and categories. Click Start, Search, All Files and Folders in Windows XP/2000; click Start, Find, Files or Folders in Windows 98. Type **`projects.usr`** in the Filename text box. If necessary, scroll down and choose a drive to search in the Look In list box. Click Search or Find Now. When the file appears in the list, right-click it; then, choose Rename. Type **`projects.old`** and then press Enter. Choose File, New from Project. WordPerfect should hesitate for a moment while the index is rebuilt; then, the list of projects should appear. Look in the Budget, Business category first.

My Outlook Address Book Fields Are Missing

When I try to create prompts that are linked to my address book fields, the fields from my Outlook address books don't show up. What do I need to do to make these appear in the list?

You must activate the Outlook integration before you can use information from your Outlook address book. Choose Tools, Settings, Environment. Enable the Use Outlook Address Book/Contact List check box. Click OK, and then Close. Your Outlook address book fields should now appear in the Edit Template Prompt dialog box.

`tconvert.wcm` NOT FOUND

I'm trying to convert an old WordPerfect template, and I've tried editing the template and running the tconvert macro. Either way, I'm getting the error message "tconvert.wcm Not Found." Where is this file?

This is a shipping macro that is installed with the program, so either the macro wasn't installed, or WP is looking in the wrong place. Choose Tools, Settings, Files, and then click the Merge/Macro tab. Make a note of the path listed in the Default Macro Folder text box. Now, choose Tools, Macro, Play. Verify that this is the same folder as the one listed in Settings. If it isn't, browse to the folder that was listed in Settings and look for the macro there.

If you still can't find it, you can get a fresh copy from the CD. Choose Start, Control Panel, Add or Remove Programs. Scroll down and select the WordPerfect Office X3 entry. Click the Change button to start the Installation Wizard. Choose Change Which Program Features Are Installed and click Next. If necessary, click the plus sign (+) next to WordPerfect Office X3 to open the list of different components. Click the plus sign (+) next to WordPerfect to open the list of different items. Click the drop-down list button next to Sample Macros and choose This Feature Will Be Installed on Local Hard Drive. Choose Next, and then Begin. Click Finish to close the Installation Wizard.

You should now be able to locate the tconvert.wcm macro in the folder that is listed in Settings.

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CHAPTER 19

Assembling Documents with Merge

In this chapter

by Laura Acklen

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Getting Familiar with Merge Terminology

Everyone calls it a *mail merge*, but you can really pull together *any* type of information to produce *any* type of document. So, although you hear more about using the Merge feature to produce personalized letters, envelopes, and labels, it's also a very powerful tool for organizing key pieces of information.

As the term suggests, a merge is a combination of information from two different sources. Typically, you have a form file, which is the document, and one data file, which contains the information you want to insert. The form file is just a regular document with merge codes in it. The merge codes act as markers for the information from the data file.

A data file is organized into records, which contain fields for every piece of information. Using the mail merge example, the data file is a list of names and addresses, and the form file is the letter. Each person, client, or event has a *record* that is divided into *fields*, such as name, company, address, and phone.

Working with Data Files

It's easiest to build a data file first, so you can use the field names that you create in the form document. Field names are used to identify the merge field codes that you create to organize the data file. For example, a typical data file might contain these fields: Name, Company, Address, City, State, Zip, Phone, Fax, and E-mail. Field names are optional, though—you can use Field1, Field2, Field3, and so on, if you prefer.

The main thing to keep in mind when you're creating the data file is that more fields mean more flexibility. For example, if you have three separate fields for the city, state, and ZIP Code, you can arrange the list by ZIP Code. The same goes for the name—if you use one field for first name and one field for last name, you can arrange the records by the last name and you can break out the first name for a personalized salutation. Each field can be acted upon individually. This is how the Publisher's Clearinghouse folks make those letters seem so personal. The last letter I received had my city and county broken out and used in the letter, as well as my name, address, and state. And these letters are extremely effective!

Creating Data Files

It's easy to create a data file from scratch, but before you do, make sure you don't already have the information stored somewhere else. There are several ways to convert information from other sources into a merge data file. You might have a little cleanup to do, but at least you aren't entering the information all over again. If you already have a file to work with, you can skip down to the next several sections, which contain information on converting tables and importing data into merge data files.

Follow these steps to create a data file from scratch:

1. Choose Tools, Merge or press Shift+F9 to display the Merge dialog box (see Figure 19.1).

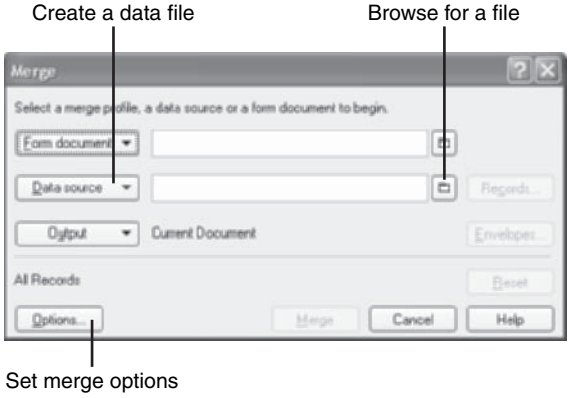


Figure 19.1
Use the Merge dialog box to set up a data file and a form document, and then merge them.

➔ For more information on pulling records directly from the Address Book during a merge, **see** "Merging with the Address Book," **p. 522**.

2. Choose Data Source to open the list of data sources that can be used in a merge.
3. Choose Create Data File to display the Create Data File dialog box (see Figure 19.2). This is where you create the field names.

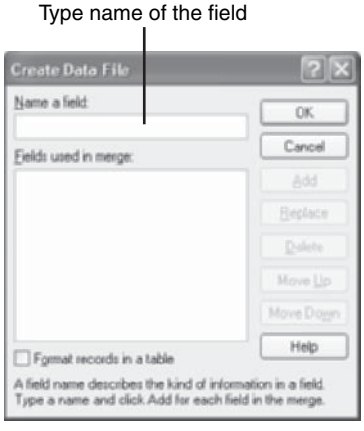


Figure 19.2
In the Create Data File dialog box, you can create and edit the field names for the data file.

4. Type the name of the first field name in the Name a Field text box.
5. Press Enter or choose Add to insert the field name in the Fields Used in Merge list box.
6. Repeat steps 3 and 4 until you've entered all the field names. If you misspell a field name, or change your mind, select the field, and then choose Delete. Figure 19.3 shows a typical list of field names.

If you can't enter all of the information you need in a field, see "I Can't Enter More Than 250 Characters in a Field" in the Troubleshooting section at the end of this chapter.

Figure 19.3
Here is a list of field names that you might use for a merge data file.

TIP FROM

The order of the field names is important because this is the order in which you'll type the information. If you need to rearrange the field names, select a name and then choose Move Up or Move Down.

7. If you want the records formatted into a table, place a check mark in the Format Records in a Table check box.

TIP FROM

Formatting a data file in a table has many advantages. In a table, each field has its own column, and each row is one record. Data files that aren't formatted as a table have merge codes that separate fields and records. You have to be especially careful when editing this type of data file so you don't accidentally delete one of the merge codes. The main disadvantage is that if you have a lot of fields, you'll get a table with lots of columns, so it's harder to navigate around and you won't be able to see all of the information on one screen.

8. Click OK when you're finished. The Quick Data Entry dialog box appears (see Figure 19.4). You can use this dialog box to enter and edit records in the data file.
9. Type the data for the first field and then press Enter or Tab (or choose Next Field) to move down to the next field. Press Shift+Tab or choose Previous Field to move back up a field.
10. Continue entering the information in each field. When you press Enter in the last field, a new record is created. You can also choose New Record from any field to create a blank record.

TIP FROM

Don't include extra spaces or punctuation marks when you enter the data. For example, don't type a comma after the city. All formatting and punctuation marks should be in the form document.

Figure 19.4
Most people prefer using the Quick Data Entry dialog box for creating and editing records in the data file.

TIP FROM

You can move back and forth between records by clicking the Previous and Next buttons at the bottom of the Quick Data Entry dialog box. Click the First button to move to the first record; click the Last button to move to the last record.

11. Choose Close when you're finished.
12. Choose Yes to save the data file to disk. The Save File dialog box appears (see Figure 19.5).
13. Type a name for the data file in the File Name text box and then click Save.

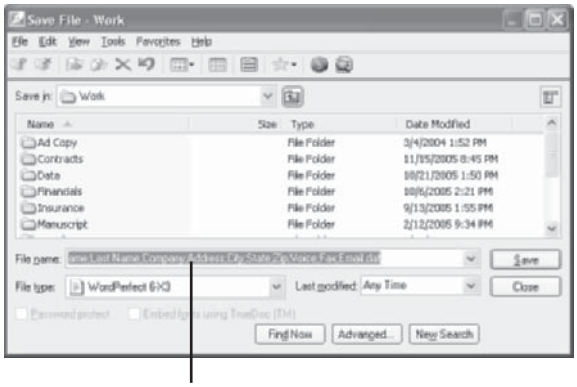
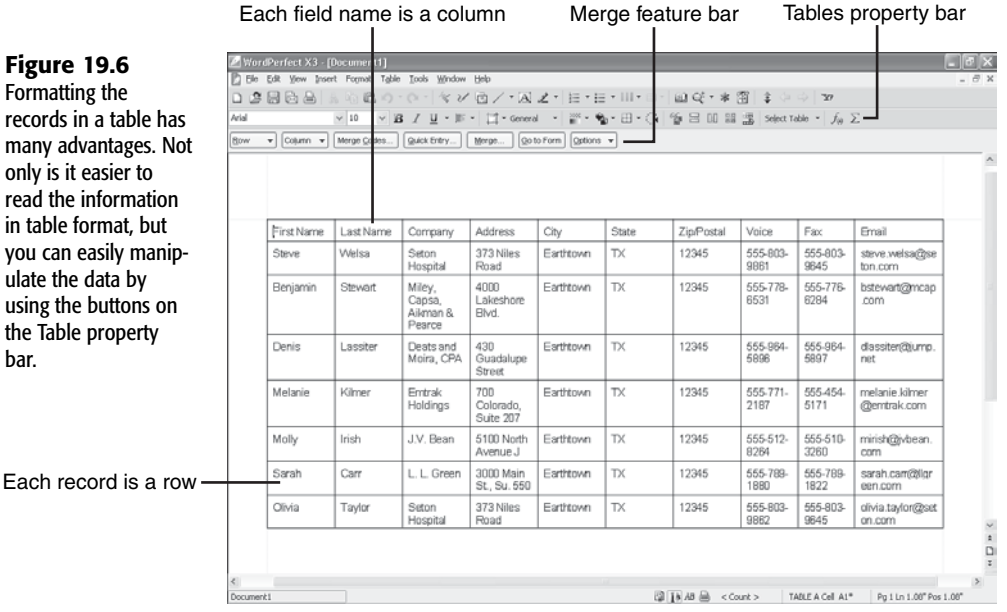


Figure 19.5
You can type a name for the data file in the Save File dialog box.

NOTE

> WordPerfect suggests a .dat extension for data files. If you follow this suggestion, you can choose WP Merge Data (*.dat) from the File Type drop-down list and display only merge data files in the file list, which makes it easier to locate your data files.

When the Save File dialog box closes, you can see the data that you've entered so far. Figure 19.6 shows the data in table format. Notice that the Merge feature bar has been added to the top of the screen. The generic property bar has also morphed into the Tables property bar with lots of buttons for working with tables.



First Name	Last Name	Company	Address	City	State	Zip/Postal	Voice	Fax	Email
Steve	Welsa	Seton Hospital	373 Niles Road	Earthtown	TX	12345	555-803-9861	555-803-9845	steve.welsa@seton.com
Benjamin	Stewart	Miley, Capsa, Aikman & Pearce	4000 Lakeshore Blvd.	Earthtown	TX	12345	555-778-6531	555-776-8284	bstewart@mcap.com
Denis	Lassiter	Deats and Moira, CPA	430 Guadalupe Street	Earthtown	TX	12345	555-964-5896	555-964-5897	dlassiter@jump.net
Melanie	Kilmer	Emtrak Holdings	700 Colorado, Suite 207	Earthtown	TX	12345	555-771-2187	555-454-5171	melanie.kilmer@emtrak.com
Molly	Irish	J.V. Bean	5100 North Avenue J	Earthtown	TX	12345	555-512-8264	555-510-3260	mirish@jvbean.com
Sarah	Carr	L. L. Green	3000 Main St., Su. 550	Earthtown	TX	12345	555-789-1880	555-789-1822	sarah.carr@llgreen.com
Olivia	Taylor	Seton Hospital	373 Niles Road	Earthtown	TX	12345	555-803-9862	555-803-9845	olivia.taylor@seton.com

Figure 19.6
Formatting the records in a table has many advantages. Not only is it easier to read the information in table format, but you can easily manipulate the data by using the buttons on the Table property bar.

After you've finished entering the information, you can always go back and edit it later. You can add and edit records directly (in the table or in the text file), or you can click the Quick Entry button on the Merge feature bar to open the Quick Data Entry dialog box.

EDITING FIELD NAMES

If you need to edit the field names, you can choose from several methods. First, if the data is in a table, you can simply edit the column headings. If the data is formatted as text (not a table), you can make your changes to the field names at the top of the data file (the field names are separated by semicolons).

Finally, you can do so from the Quick Data Entry dialog box (refer to Figure 19.4). Click the Field Names button to open the Edit Field Names dialog box, where you can add, rename, and delete field names (see Figure 19.7).

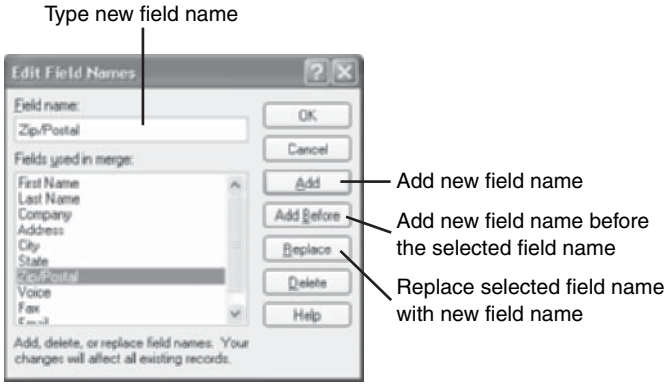


Figure 19.7
From the Edit Field Names dialog box, you can add new fields, rename fields, and remove fields from the data file.

NOTE

If the Field Names button is grayed out in the Quick Data Entry dialog box, field names weren't created in this data file. See the section "Adding Field Names to a Data File" later in this chapter for the steps to add the field names.

CAUTION

Beware! Renaming and deleting field names deletes the contents of that field in every record. When you use Delete, you at least get a warning message, so you have a chance to bail out; you don't get a warning when you rename a field name. It's better to be safe than sorry—save the data file before you edit the field names.

TIP FROM

In large data files, you can use the Find feature to locate records quickly. In the Quick Data Entry dialog box, click the Find button to open the Find Text dialog box. Otherwise, press F2, press Ctrl+F, or choose Edit, Find and Replace to open the Find and Replace dialog box. In either dialog box, type the text you want to search for in the Find text box and then choose Find Next.

CONVERTING DATA FILE TABLES TO TEXT

When you create a data file, you have a choice. You can create the data file as a table or as a text file. You can see what the table looks like in Figure 19.6. Figure 19.8 shows what a data text file looks like.

You can convert a data file table to a text data file. Interestingly, you can even create a text data file from an ordinary table (without the field names). The following are the steps to convert a table into a text data file:

1. Move to the top of the document and turn on Reveal Codes (by pressing Alt+F3).
2. Move the red cursor to the left of the Tbl Def code (the table definition code).
3. Press Delete. The Delete Table dialog box appears (see Figure 19.9).

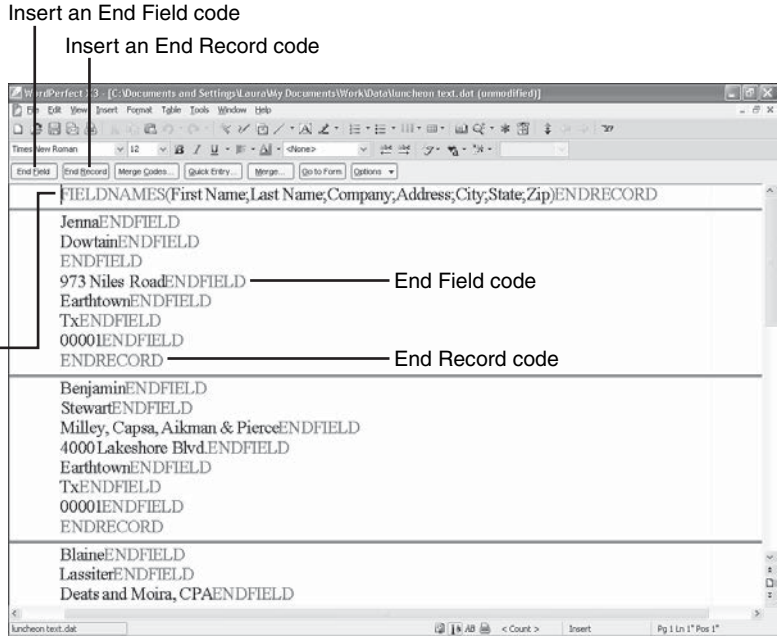


Figure 19.8
A data text file stores the field names in the first record.

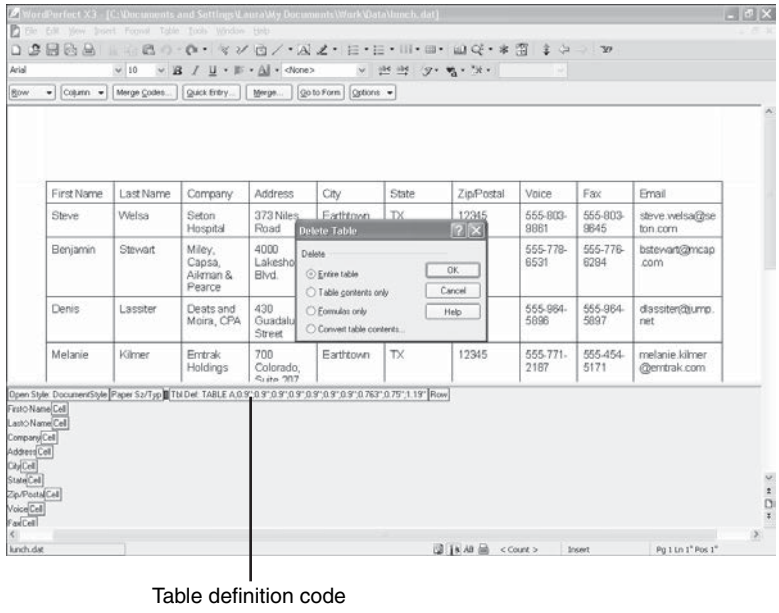


Figure 19.9
Depending on the type of table, you can choose to create the text data file with or without field names in the Delete Table dialog box.

4. Choose Convert Table Contents to open the Convert: Table to Text dialog box.
5. Choose Convert Text to Merge Data File (.dat). Selecting this option also enables the option to use the text in the first row as field names.

6. If you have a field name record at the top of the file, choose Use Text in First Row As Field Names. Otherwise, leave the check box disabled.

WordPerfect creates the text data file. If you started out with a table that didn't have field names, you can add those now (the steps are in the next section).

Navigating Through Long Data Files

In a lengthy text data file, it's easy to lose your place. If you turn on line numbering, you have a number next to each field, which not only helps you keep your place, but also makes it easier to spot records with missing fields. Line numbers restart numbering at the top of every page, so every record has the same line numbers. At the top of the data file, choose Format, Line, Numbering. Place a check mark next to Turn Line Numbering On, and then click OK.

Also, the application bar has a General Status button (on the right, next to the Combined Position group) that displays the field name where the insertion point is currently located. The General Status button can be enlarged so that the entire field name shows (right-click the button, choose Settings, and then click and drag the left or right border of the button) .

IMPORTING DATA INTO MERGE DATA FILES

You can use files from other applications as data files, and in some cases, you need not convert them prior to the merge. In addition to files from other word processing programs, WordPerfect supports the import of data files created in spreadsheet and database programs. If field names were used in the source application, they are recognized and used by WordPerfect, as shown in Figure 19.10.

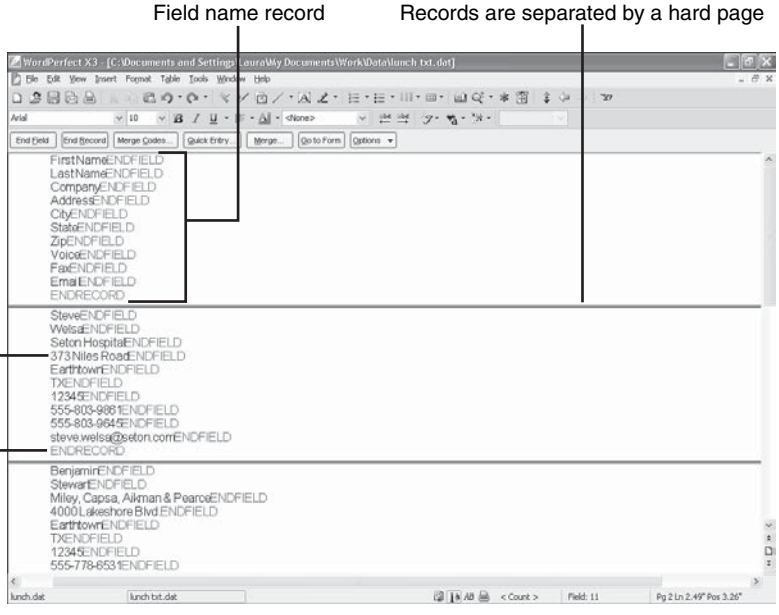


Figure 19.10
This text data file has a field name record so the fields can be identified by name instead of by number.

TIP FROM

If you're upgrading to WordPerfect X3 from a previous version of WordPerfect, you can use secondary merge files as data files.

Files from popular spreadsheet programs can be imported into WordPerfect and then used as merge data files. However, because spreadsheets are converted into tables, they are restricted by the same limitations as tables. For example, there is a 64-column limit on tables, so if the spreadsheet has more than 64 columns, the data in the remaining columns won't be imported. One workaround is to import smaller sections of the spreadsheet—this is where the convenience of named ranges becomes apparent. Another workaround is to save the spreadsheet as a database, and then import it into WordPerfect. For example, you can save a Quattro Pro spreadsheet as a Paradox database file, and then import the Paradox database into WordPerfect.

➔ If you want to convert a spreadsheet file into a data file table, **see** "Converting Spreadsheet Data," **p. 365**.

➔ If you want to create a link to a spreadsheet file, **see** "Linking Spreadsheet Data," **p. 366**.

The database format in WordPerfect is the same as a merge data file, so you can either convert the database file to a merge data file, or you can use it "as is." You might also consider creating links to a database file so that when you update the database, the data file information is updated as well.

➔ If you want to convert the database file to a merge data file, **see** "Converting to WordPerfect Formats," **p. 355**.

➔ If you want to use the database file without first converting it to a data file, **see** "Using Database Data with Merge," **p. 362**.

➔ If you want to create a link to a database file, **see** "Linking Database Data," **p. 359**.

ADDING FIELD NAMES TO A DATA FILE

Often you inherit files from other users, who may or may not understand how to use the program. Such is the case with merge data files. Not everyone takes the time to create field names. Granted, you don't have to do it. As long as you don't mind referring to the fields by number, it's fine to leave the file that way. However, in files with lots of fields, field names are necessary to preserve your sanity.

Follow these steps to add field names to a text data file:

1. Press Ctrl+Home to move to the top of the document.
2. Click the Merge Codes button.
3. Scroll through the list, and then select the FIELDNAMES code.
4. Choose Insert.
5. In the Create Data File dialog box (refer back to Figure 19.2), type the field names, pressing Enter between each field name.

6. When you are finished, choose OK to insert a field name record at the top of the data file, and then choose Close.

At the end of the line, notice the End Record code, followed by a hard page (refer to Figure 19.8). Each record in a text data file is separated by a hard page break. This ensures that when you merge the data file with a form document, the resulting documents are on separate pages.

You can also add field names to data in a table. After you insert a new row at the top of the table, you type the field names then designate that row as a header row.

Follow these steps to add field names to data in a table:

1. Right-click in the first cell of the top row.
2. Choose Insert. The Insert Rows/Columns dialog box appears.
3. Choose Rows, choose Before in the Placement section, and then click OK.
4. Type a field name in each column.
5. Right-click in the field name row and choose Format to display the Properties for Table Format dialog box.
6. Click the Row tab, and then enable the Header Row (Repeats on Every Page) check box.
7. Choose OK.

When you're working in a table, you don't need to insert End Field and End Record codes because WordPerfect knows that each row is a record and each column is a field.

TIP FROM

If you're doing heavy-duty data entry in a text data file, it slows you down to take your hand off the keyboard to click a button. Instead of clicking the buttons on the Merge feature bar, press Alt+Shift+F (or Alt+Enter) to insert an End Field code. Press Alt+Shift+Enter to insert an End Record code.

CREATING FORM FILES

Relax—this is the easy part, and if you've already typed the document, you're almost done! An existing document can be turned into a form file in just seconds. You just insert the merge codes and save the document. Voilà! It's ready for a merge.

If you're creating the form file from scratch, make sure that you insert all the formatting codes you want in the finished documents. You definitely don't want to put formatting codes (or anything besides text) in the data file; otherwise, it is duplicated over and over again.

TIP FROM

If you're upgrading from a previous version of WordPerfect, you might be more familiar with the terms *form file* or *primary merge file* that describe the form document.

If you want to use an existing document, open it now. In a new document, type any text that you need to precede the information that you want to insert during the merge. Then, follow these steps:

1. Choose Tools, Merge (or press Shift+F9) to open the Merge dialog box (seen in Figure 19.1).
2. Choose Form Document to open a drop-down list of options (see Figure 19.11).

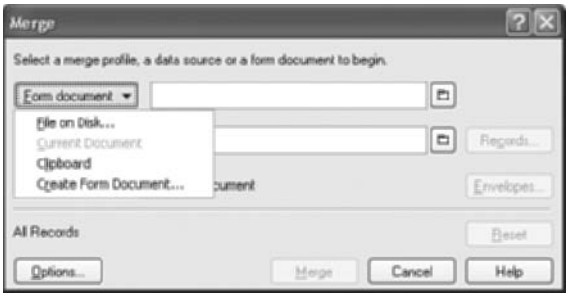


Figure 19.11
Select how you want to create the form document: You can convert the current document into a form document or you can create a form document from scratch.

3. Choose Create Form Document.
4. In the Data File Source dialog box, choose Use File in Active Window, then OK. The Associate Form and Data dialog box appears (see Figure 19.12).

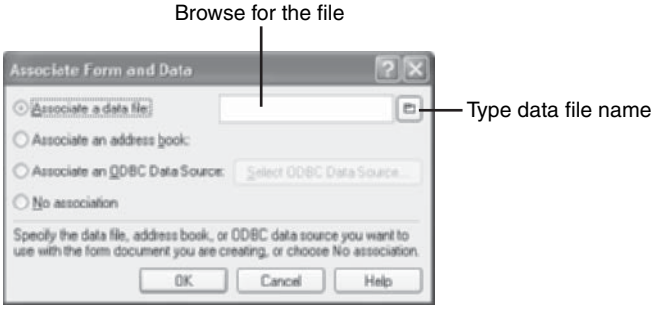


Figure 19.12
In the Associate Form and Data dialog box, you can identify a data file or other data source for use with this form document.

5. Type the name of the data file in the Associate a Data File text box or click the Files icon to search for the file. If you haven't created the data file yet, or you don't know where it is, choose No Association.

➔ For more information on associating an Address Book with a form document, **see** "Merging with the Address Book" later in this chapter.

6. Click OK. WordPerfect adds the Merge feature bar at the top of the document (see Figure 19.13). This document is now marked as a form document.
7. Choose Cancel to close the Merge dialog box so you can finish working on the form document.

NOTE

> If you associated a data file in step 4, that file is now tied to this one. Whenever you need to edit the data, just click the Go to Data button on the Merge feature bar. WordPerfect opens the data file in another window and switches you to that window. To go back to the form document, click the Go to Form button in the data file window.

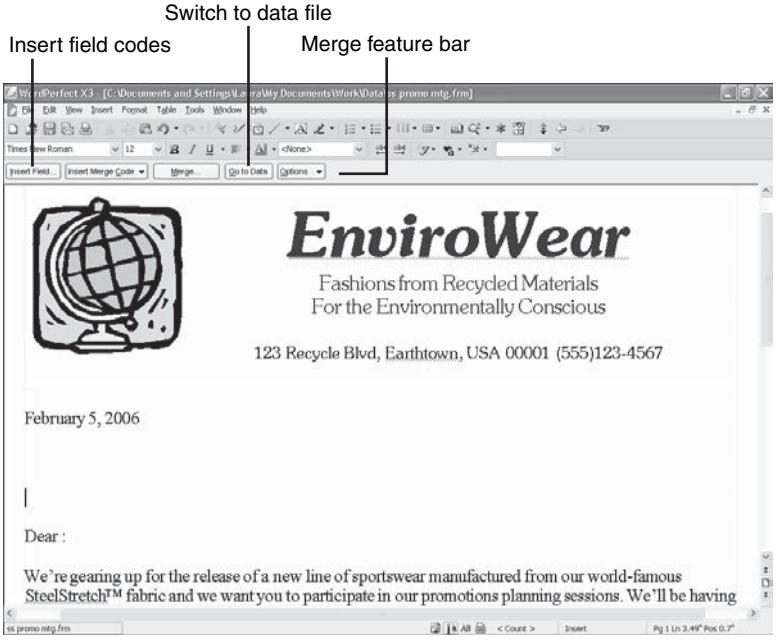


Figure 19.13
The Merge feature bar is included in every form document and data file that you create.

8. Position the insertion point where you want to insert the first piece of information. For example, in a typical mail merge, you insert the name and address information at the top of the letter.
9. Click the Insert Field button on the Merge feature bar. The Insert Field Name or Number dialog box appears (see Figure 19.14). The field names (or numbers) in the associated data file appear in the Field Names list box.

CAUTION

> If you haven't associated a data file yet, the Insert Field dialog box won't have a list box full of field names. Instead, you can type in a field name or number and insert it in the data file.

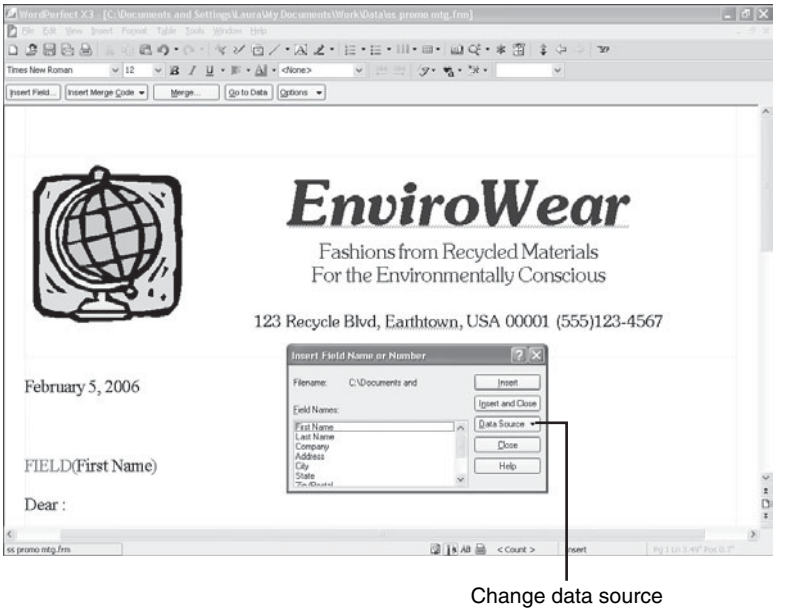


Figure 19.14
In the Insert Field Name or Number dialog box, you can select a field name to insert in the form document.

TIP FROM

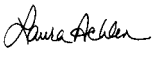
When you associate a data file with a form document, it isn't written in stone. You can click the Data Source button in the Insert Field Name or Number dialog box and choose a different source. When you do, the field names from that source appear in the list.

10. Double-click a field name to insert it in the document. WordPerfect inserts the field name (or number) in parentheses, preceded by FIELD (see Figure 19.15).
11. Continue inserting field names as necessary to complete the form document. Click Close to close the Insert Field Name or Number dialog box. Figure 19.16 shows a sample letter with the mailing address and salutation field codes.

NOTE

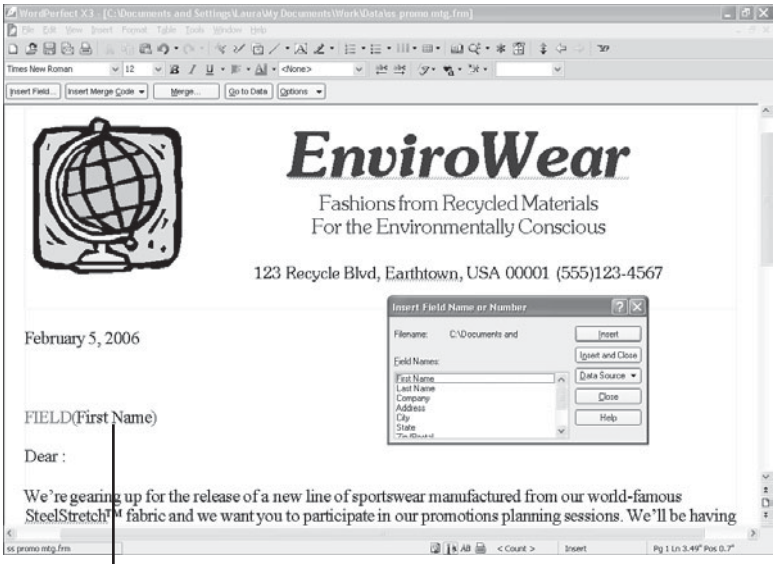
Make sure you include any necessary spaces, commas, or other punctuation between the field names.

TIP FROM



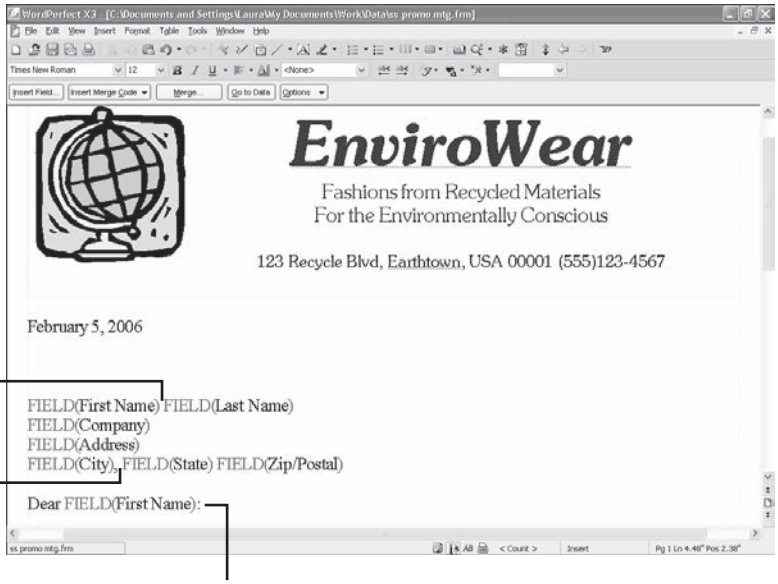
Instead of typing in the date, you can insert a merge code that inserts the date for you when you run the merge. Click the Insert Merge Code button to open a drop-down list. Select Date.

Figure 19.15
Merge codes are displayed in a different color so you can pick them out from the rest of the text.



First Name merge code

Figure 19.16
A mailing address block and a salutation have been constructed using field names from the data file.



Space between first and last names

Comma and space after city

Colon after salutation

The most readily understood use of the Merge feature is in a mail merge, where you are merging a letter with a list of addresses. It's important to point out that Merge can be used for much more. A form document might be an invoice or a billing statement with a database file as the data source. Or, how about a loan document, where the same information is

plugged into a million different places? (You could import spreadsheet data into a loan application form document.) Or, someday you might need to create 250 "Hello…My Name Is" labels for an awards dinner, in which case the form document would be a labels form. Law offices often prepare multiple documents with the same information so they might put together a series of forms with one data file. Because each form need not use every field in the data file, there could be a collection of data in the data file that would serve multiple forms. These are just a few examples—the possibilities are endless.

NOTE

> You can always turn a merge file (data file or form document) back into a normal document. In a form document, strip out all the merge codes by selecting and deleting them. Click the Options button on the Merge feature bar. Choose Remove Merge Bar. You'll see a message that tells you the file will not be recognized as a merge file. Click OK to continue or Cancel to bail out.

MERGING A FORM DOCUMENT WITH A DATA FILE

Now you've got a form document and a data file, so you're ready to go. If you've got the form document or data file open, you can click the Merge button on the Merge feature bar. Otherwise, choose Tools, Merge to open the Merge dialog box (see Figure 19.17).

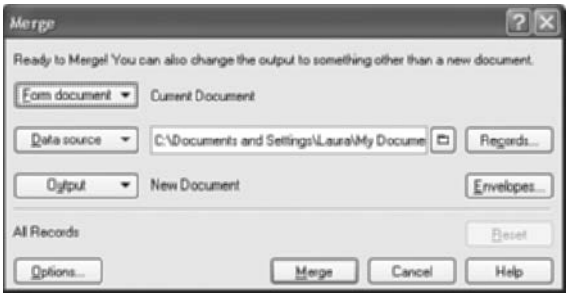


Figure 19.17
You can identify the form document, the data file, and the output location in the Merge dialog box.

What you see in this dialog box varies depending on what files you have open (or if you have any files open at all). If you click the Merge button from the form document, Form Document is set to Current Document. If you've associated the form document with a data file, the name of that file appears next to Data Source.

If you've clicked the Merge button from the data file, the name of the file appears next to Data Source. If this data file is already associated with a form document, the name of that document appears next to Form Document. Otherwise, you'll need to type the filename next to Form Document or click the Files icon to search for the file.

Finally, if you aren't running the merge from either document, you see a blank text box next to Form Document and Data Source.

In any case, you need to fill in the blanks by typing the names of the files or clicking the Files icon to search for them. By default, Output is set to New Document. You can also set the merge to Current Document. Click the Output drop-down list arrow to see the other three options:

- **Printer**—Sends the output directly to the printer.
- **File on Disk**—Creates a file and places the output in the file.
- **Email**—Sends the output via electronic mail. See the section "Merging to E-mail," later in this chapter, for more information.

When you have everything filled in, click Merge. WordPerfect matches up the field names (or numbers) in the form file and the field names (or numbers) in the data file and inserts the information into the form. The results are displayed in the current document or a new document, unless you chose to merge directly to the printer, a file, or e-mail. Figure 19.18 shows the results of a mail merge.

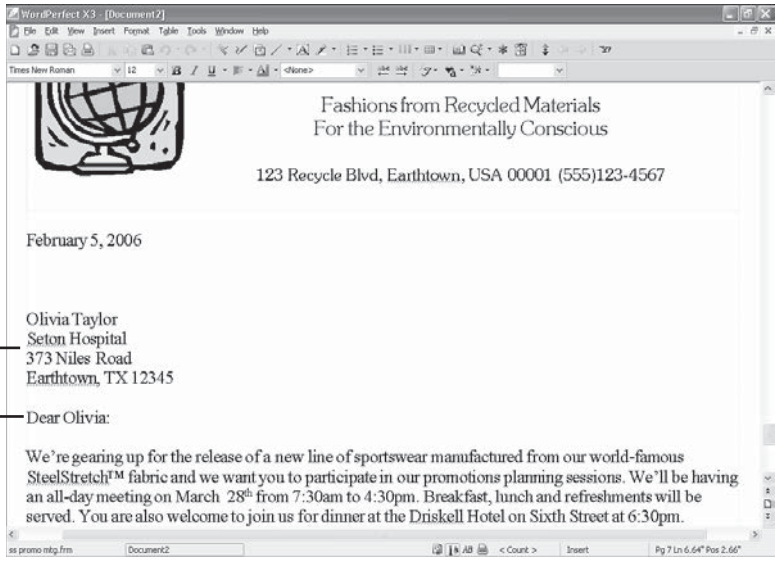


Figure 19.18
WordPerfect combines the information from the data file with the text in the form document and creates a new document.

If you got unexpected results when you merged the two files, see "This Isn't What I Expected" in the Troubleshooting section at the end of this chapter.

If you've noticed that QuickCorrect no longer works after you open a merge form or data file, see "Why Does Merge Cancel Out QuickCorrect?" in the Troubleshooting section at the end of this chapter.

TIP FROM

If you start a merge and then suddenly realize that you've done something wrong, press Esc to stop the merge.

NOTE

Unless you're merging to a file on disk so you can work with the results later, you don't need to save the results of a merge. If you do, you're duplicating the information that you have in the form document and data file. In most cases, you print the documents and then close the file without saving. Remember, it takes only a few seconds to run the merge again.

TIP FROM

Here's something you might not have thought of yet: You can add photos or other images to a merge data file. You might, for example, put together a staff directory published from a database that includes photos. When you insert the photo (or other image) into the data file, the position properties that you specify (such as tied to a paragraph, 0" from the right) carry over through the merge.

MERGING WITH THE ADDRESS BOOK

WordPerfect's Address Book is integrated into all the suite applications, and it's well suited for tracking all sorts of contact information. If you maintain a comprehensive address book, you might not ever create a data file again. During a merge, you can select records directly from an address book.

When you create a form document, you can associate the form with an address book instead of a data file (refer to Figure 19.12). If you need to switch to another address book, or if you created the form document with a different association, you can edit the association.

There are several ways to do this, but the most direct is to click the Insert Field button on the Merge feature bar, and then click the Data Source drop-down arrow. Choose one of the address books from the list. One of the advantages of this method is that you can see an updated list of field names right away.

After you insert the field codes from the address book, click the Merge button to open the Merge dialog box, and then click Merge.

➔ For the scoop on the Address Book, **see** Chapter 20, "Working with Address Books."

CREATING ENVELOPES DURING A MERGE

If you are producing letters, you probably need envelopes or labels for them. You can create an envelope form when you merge so it's all done together. If you need labels, you need to create a labels form document and insert the field codes, and then merge that form with the data file. See the section "Merging to Labels," later in this chapter, for more information.

Follow these steps to generate envelopes during the merge:

1. In the Merge dialog box, click the Envelopes button. WordPerfect opens an envelope form document. If necessary, type the return address (or leave it out if your envelopes are preprinted).

CAUTION

> If the Envelopes button is grayed out, you'll need to specify the form document, data file, and output location. After you fill these in, the Envelope button will become available.

2. Press Ctrl+End to move down to the mailing address block. If necessary, delete the text in the mailing address block.
3. Click the Insert Field button to open the Insert Field Name or Number dialog box.
4. Double-click a field name (or number) to insert the field code. Include all the necessary spacing and punctuation between the fields (see Figure 19.19).

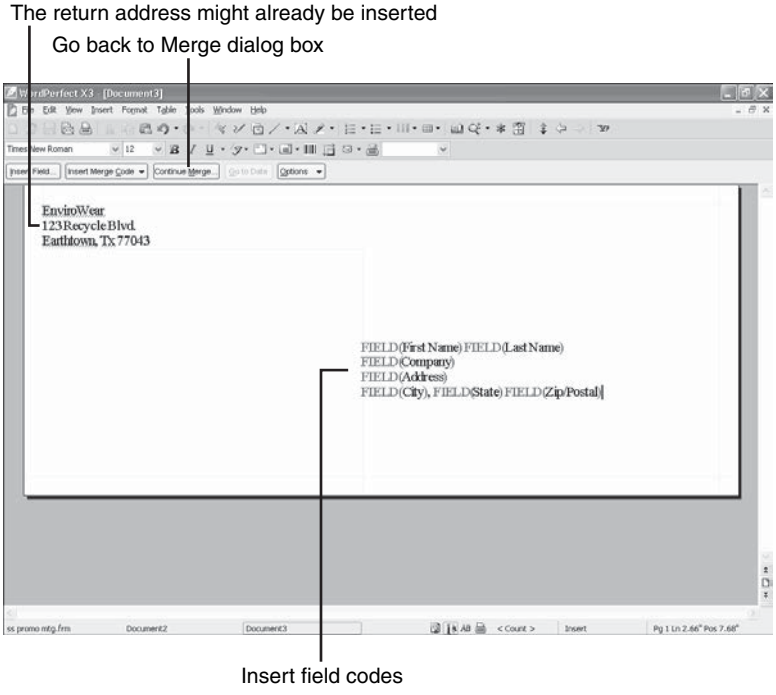


Figure 19.19 Creating the envelope during a merge has an advantage: WordPerfect creates the envelope form document and integrates it into the merge process.

5. Click Continue Merge when you're finished. The Merge dialog box appears (refer to Figure 19.17).
6. Click Merge.

When a merge is complete, the insertion point is always on the last line of the last page, so don't panic if you don't see the letters right away. The envelopes are created at the end of the document, and you can either page up through the envelopes and proof them for accuracy, or you can press Ctrl+Home to move to the top of the document.

MERGING TO LABELS

Creating labels isn't integrated in the merge process, but it takes only a minute to create a labels form, associate it with the data file, and merge.

Follow these steps to merge to labels:

1. If you've already defined the labels, you can skip down to step 4. Otherwise, in a blank document, choose Format, Labels to open the Labels dialog box (see Figure 19.20).
2. Choose Laser Printed or Tractor-Fed to narrow down the list, and then select the label definition that matches your labels.

NOTE

> Just because your label isn't listed in the Labels box doesn't mean the definition doesn't exist. Check the layout (such as 3 columns by 10 rows) or the dimensions, and compare them to the definitions in the list. You'll probably find an exact match (or at least a close approximation).

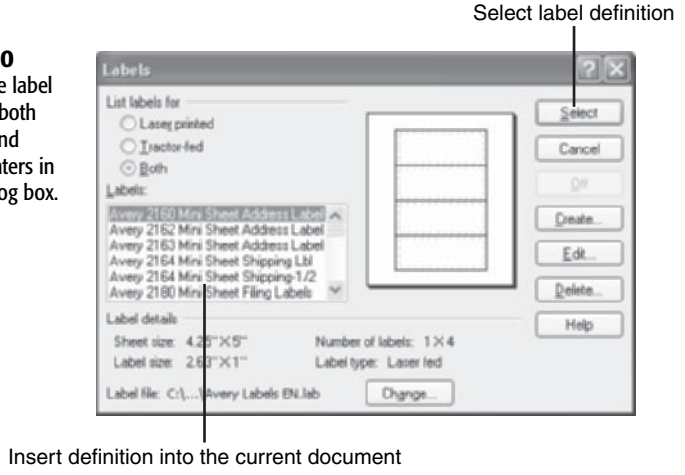


Figure 19.20
You can choose label definitions for both laser-printed and tractor-fed printers in the Labels dialog box.

3. Choose Select to insert the definition in the document.
4. Choose Tools, Merge, Form Document, Create Form Document, Use File in Active Window, OK to display the Associate Form and Data dialog box (refer to Figure 19.12).
5. Specify a data source, and then click OK. The Merge feature bar appears in the label document.
6. Choose Cancel to clear the Merge dialog box.
7. Click the Insert Field button to open the Insert Field Name or Number dialog box (refer to Figure 19.14).

8. Double-click a field name to insert it in the label. Make sure you include all the spacing and punctuation between the fields.
9. When you're finished inserting field codes, click Close to close the Insert Field Name or Number dialog box. Figure 19.21 shows a completed label form.
10. Click the Merge button on the feature bar. Verify the data source and output location, and then choose Merge to create the labels.

TIP FROM

You can take a shortcut when creating labels with the WordPerfect address book. Insert the label definition in a blank document, and then choose Tools, Address Book. Select the records, and then click Insert. Select a format in the Format Address dialog box, and then choose OK. WordPerfect creates a label for each record. For more information, see Chapter 20.

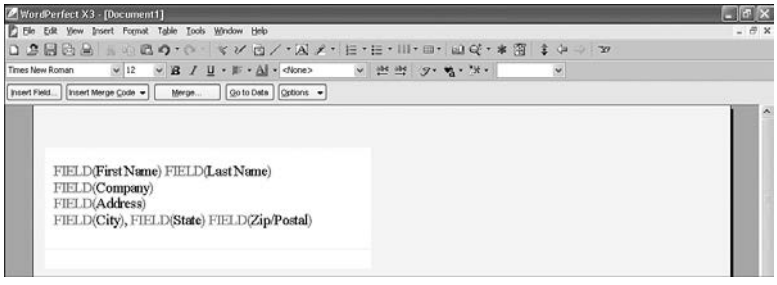


Figure 19.21
This form document is actually a sheet of labels, which will be filled in during the merge.

You can create a sheet of identical labels with the Merge feature. Create the label form and type the text of the label. Choose Tools, Merge. Choose Form Document, Create Form Document, Use File in Active Window, No Association, OK. Then, in the Merge dialog box, set the Data Source to None. Click Options to open the Merge Options dialog box (see Figure 19.22). Type the number of labels on the page in the Number of Copies for Each Record text box. Choose OK, then Merge.

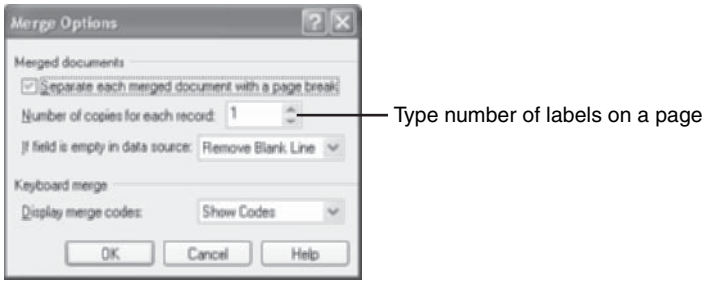


Figure 19.22
You can enter the number of copies (labels) in the Merge Options dialog box.

NOTE

> The maximum number of copies per record is 255, so that's the maximum number of identical labels you can create.

Figure 19.23 shows a page of identical labels. This is a notable exception to the "Don't save merge results" rule—you might want to save this label page for future printing.

TIP FROM

> If every other label is blank, you need to remove the page break at the end of the original label. Close this document without saving and switch back to the label form document. Position the insertion point at the end of the address and press Delete until only one label is displayed. Try the merge again.

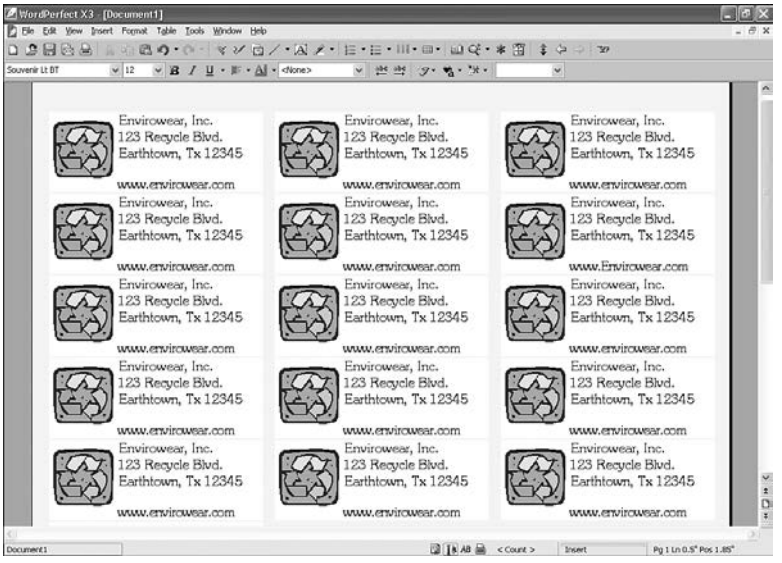


Figure 19.23
Using the Merge feature, you can create a sheet of identical labels.

MERGING TO E-MAIL

Here's another intriguing possibility. You can create personalized messages and send them out via electronic mail. Think about it—you could send out meeting notices, press releases, billing statements, order confirmations, shareholder information, invoices, class schedules, responses to requests for information from your company's Web site—the list goes on and on.

Follow these steps to merge to e-mail addresses:

1. From either the data file or form document, click the Merge button on the Merge feature bar. Otherwise, choose Tools, Merge.
2. Set the form document and the data source.

3. Click the Output drop-down arrow and choose E-mail. The Merge to E-mail dialog box appears (see Figure 19.24).

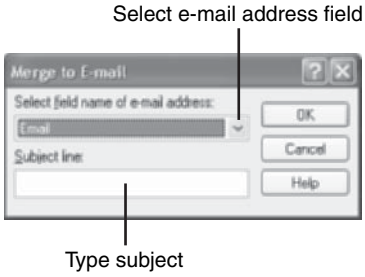


Figure 19.24
You can select the field that contains the e-mail address and type a subject for the messages in the Merge to E-mail dialog box.

NOTE

> Changes to the Output settings in the Merge dialog box are sticky, which means they stay in effect until you change the dialog box settings again. Keep this in mind because the next time you merge, your output will be sent via e-mail.

4. Click the Select Field Name of E-Mail Address drop-down list arrow and choose the field that contains the e-mail address.
5. Type a subject in the Subject Line text box, and then click OK to return to the Merge dialog box.
6. Choose Merge.
7. If the Choose Profile dialog box appears, select a profile from the Profile Name drop-down list, and then click OK to start the merge.

MERGING TO TABLES

Tables make popular form documents because they are incredibly flexible and easy to work with. You can merge a data file into a table form document, so that each record has its own row, with the insertion of the Repeat Row merge code.

Follow these steps to create a table form document:

1. Create a table with one row and as many columns as you need for the fields.

➔ For the steps to create a table, **see** "Creating Tables," **p. 249**.

2. Click in the first cell (upper-left corner).
3. Choose Tools, Merge, Form Document, Create Form Document, Use File in Active Window, OK. The Associate Form and Data dialog box is displayed (refer to Figure 19.12).
4. Select a data file, an Address Book, or an ODBC data source to associate with this form document, and then click OK.
5. Choose Cancel to clear the Merge dialog box.

6. Click the Insert Field button to open the Insert Field Name or Number dialog box.
7. Double-click a field name to insert it in the table. Make sure you include all the necessary spacing and punctuation between the field codes. Press Tab to move to the next cell or just click in the cell.
8. When you're finished inserting field codes, click Close to close the Insert Field Name or Number dialog box.
9. Click in the last cell of the last row, after any field codes or text.
10. Click the Insert Merge Code button on the Merge feature bar and then choose More to open the Insert Merge Codes dialog box (see Figure 19.25).

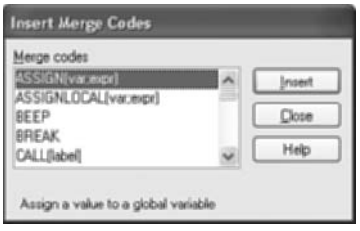


Figure 19.25
The Insert Merge Codes dialog box includes a list of merge commands.

NOTE

> The REPEATROW command is but one command in a long list of merge commands. The Merge feature has its own programming language for creating "intelligent" merge documents. Unfortunately, covering the merge commands is beyond the scope of this book. But don't despair—you still have the help topics. On the Index tab of the Help Topics dialog box, type `merge commands`, and then double-click the matching help topic in the list box.

11. Scroll down through the list, and then select the REPEATROW command.
12. Choose Insert, and then choose Close to insert the command, and close the Insert Merge Codes dialog box. The REPEATROW command is inserted in the last cell (see Figure 19.26). This command automatically creates a new row for each record in the data file.

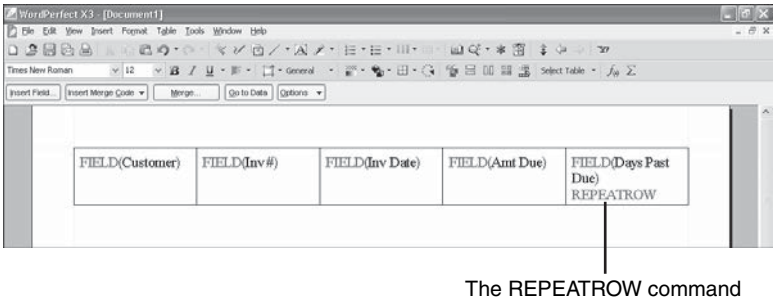


Figure 19.26
You need the REPEATROW command in the last cell of the table, after the field name, if you want the merge to create a new row for every record.

13. Choose Merge to open the Merge dialog box.
14. Specify a data source and verify the output location.
15. Choose Merge.

CAUTION

> If you have empty cells in the table, those fields were empty in the data source. If that's the case, print this table so you can see which gaps you need to fill, and then close the table without saving. Open the data source and enter the missing data. Save your changes, and try the merge again.

SORTING AND SELECTING RECORDS

Managing the data in your data source, whatever it might be, is an important part of your office automation system. You'll save hours if you can keep the information in a single source up to date. If you've been creating small data files for every project, stop right now. The more data files you have, the less likely you are to keep up with them.

It's easier to create larger data files where you can update everything at once. You can sort the records and then select only the records that you want to work with. For example, if you want to send a notice only to people living in a certain city, you can sort the records by the City field and then select the records that contain that city.

SORTING DATA FILES

With the Sort feature, you can group common records, making it easier to select them for a merge or to update the information in the records. Bulk mail, for example, must be bundled according to certain postal standards. You could arrange the data file in ZIP/Postal Code order before you merge, for example.

The default sort is to arrange the records by the first column of the table or the first word in a merge data file. You can create your own sort if you want to sort by something else. There is a trick to doing this—instead of using field names, you specify the column number or the field number. Right now, you can't choose from a list of field names in the Sort dialog box, so you have to remember to count the columns or count the fields so that you know the number of the field.

➔ The steps for sorting merge data files are almost identical to those for sorting a table, so for more information, **see** "Sorting Database Data in Tables," **p. 359**.

SELECTING RECORDS

Nine times out of ten, you work with a larger set of data than you need for the merge. I mean, how often do you send a letter or e-mail to everyone in your Address Book? If the records have something in common, you can select them by specifying certain conditions. Or, you can simply choose which records you want from the list.

Follow these steps to select records from a data file:

1. In the Merge dialog box, make sure the data source is properly identified.
2. Choose Records to open the Select Records dialog box (see Figure 19.27).

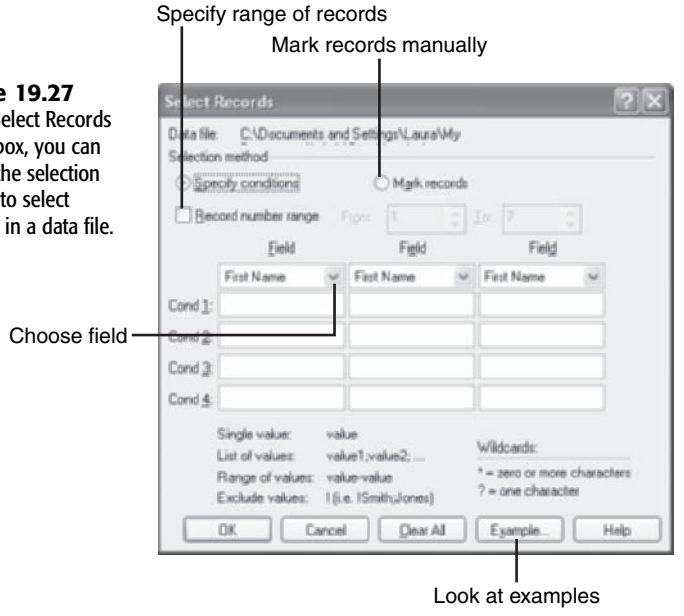


Figure 19.27
In the Select Records dialog box, you can define the selection criteria to select records in a data file.

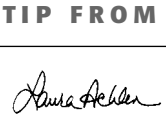
3. If you want to specify a range of records, put a check mark next to Record Number Range, and then type the beginning number in the From text box and the ending number in the To text box.
4. In the first column, click the Field drop-down list and select a field from the list.
5. Type the condition that you want to set in the Cond 1 text box.

NOTE

> Each condition line defines a set of records that are to be selected (or excluded) from the merge. Each column defines the field for which you want to set the condition(s). You can define more than one condition for a single row, so more than one field can be involved. Only records that meet all the conditions in the row are selected. Specifying more than one row of conditions selects records that meet any row of conditions.

6. If necessary, select a field from the Field drop-down list and type the condition in the second column.
7. If necessary, select a field from the Field drop-down list and type the condition in the third column.
8. Repeat these steps to set any other conditions you want to use.

TIP FROM



If you've made a mess of things and you just want to start over, click Clear All to reset the fields and clear all the conditions.

9. Click OK when you're done to return to the Merge dialog box.

If you're missing records that match your conditions, see "Not All the Records Are Being Selected" in the Troubleshooting section at the end of this chapter.

When you aren't sure how to set a condition, WordPerfect gives you some excellent examples. Click the Example button at the bottom of the dialog box to display the Examples of Selecting Records dialog box (see Figure 19.28). There is even a second page that you can look at. Choose More to display the second page.

Figure 19.28
The Examples of Selecting Records dialog box has a series of examples to help you understand how to set conditions.

In some cases, it's easier to mark the records manually, especially in cases where there is no common element. In this situation, choose Mark Records. The dialog box options change to those for selecting records directly from the data file (see Figure 19.29).

You can change which field appears first in the list. For example, you might need to see the cities, not the first and last names. Click the First Field to Display drop-down list arrow and choose a field from the list. Choose Update Record List to update the list with the new first field.

To select records, click the check box next to the record. If the records are one right after the other, click the first record, and then hold down the Shift key and click the last record. Otherwise, click the first record, and then hold down the Ctrl key while you click the other records. After you've selected the records, click the check box for a selected record to place check marks in all of the selected records check boxes. You can also select records with the

keyboard by pressing the spacebar to place a check mark in the check box. Use the arrow keys to move up and down the list and the spacebar to select the records. Click OK when you're done to return to the Merge dialog box.

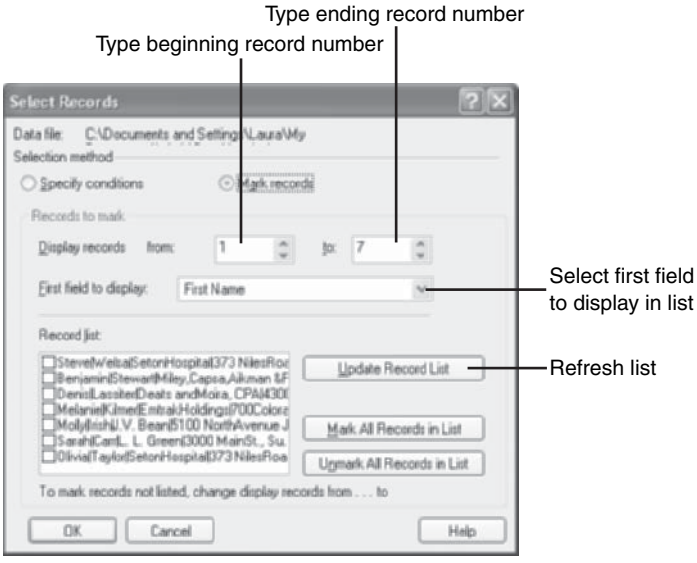


Figure 19.29
Selecting Mark Records enables you to manually select records from the data file.

CREATING FILL-IN-THE-BLANKS FORMS

You might have a project that seems ideal for a merge, except that some of the information is variable, so it isn't well suited for a data file. Well, guess what—you don't have to have a data file to perform a merge. You can merge with the keyboard—in a manner of speaking.

A form document can be created with Keyboard merge codes that stop and wait for the user to type in the information, rather than pulling it from a data file. You can create a detailed message that explains what the user should be typing at this point. After the information has been entered, the merge will move on to the next Keyboard code.

Follow these steps to create a fill-in-the-blanks form:

1. If you've already created the document, open it now.
2. Choose Tools, Merge, Form Document, Create Form Document, Use File in Active Window.
3. In the Associate Form and Data dialog box, choose No Association, OK.
4. Choose Cancel to clear the Merge dialog box.
5. Click in the document where you want to insert the Keyboard merge code.
6. Click the Insert Merge Code button and then choose Keyboard to open the Insert Merge Code dialog box (see Figure 19.30).

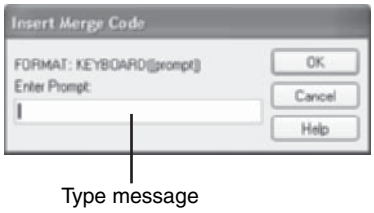


Figure 19.30
Type the message that you want to appear in the Insert Merge Code dialog box.

7. Type the prompt text that you want to appear, and then click OK to insert the Keyboard code in the form.
8. Repeat steps 4–6 to insert any other prompts for this form document. Figure 19.31 shows a form document with four Keyboard codes that prompt for the heading information.

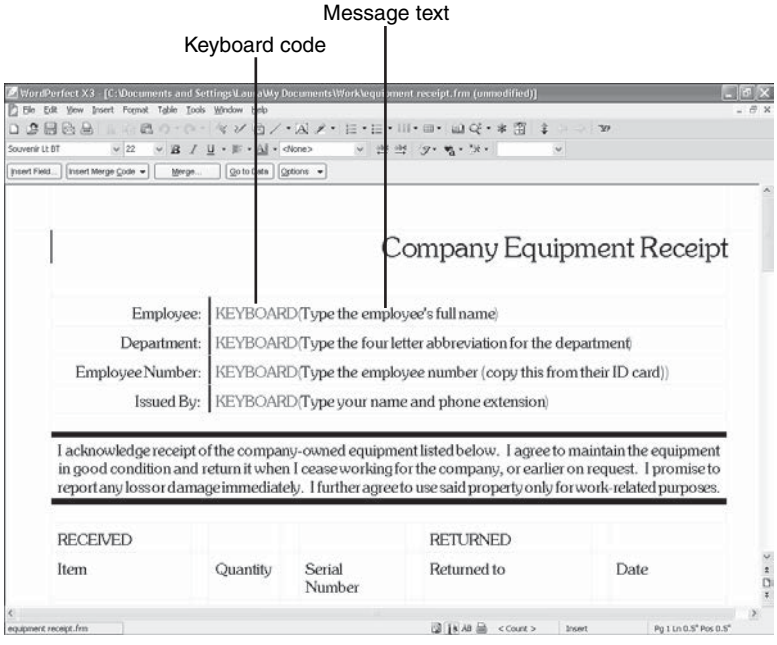


Figure 19.31
The keyboard code includes the message text in parentheses.

9. When you're ready to fill in the form, choose Tools, Merge or click the Merge button on the Merge feature bar. Verify the location of the data file (if there is one), the form document, and the output, and then choose Merge. When a keyboard command is encountered, the merge pauses and displays the prompt message (see Figure 19.32) .
10. Type the requested information, and then press Alt+Enter or Alt+Shift+C (or click the Continue button on the Merge feature bar) to continue the merge.

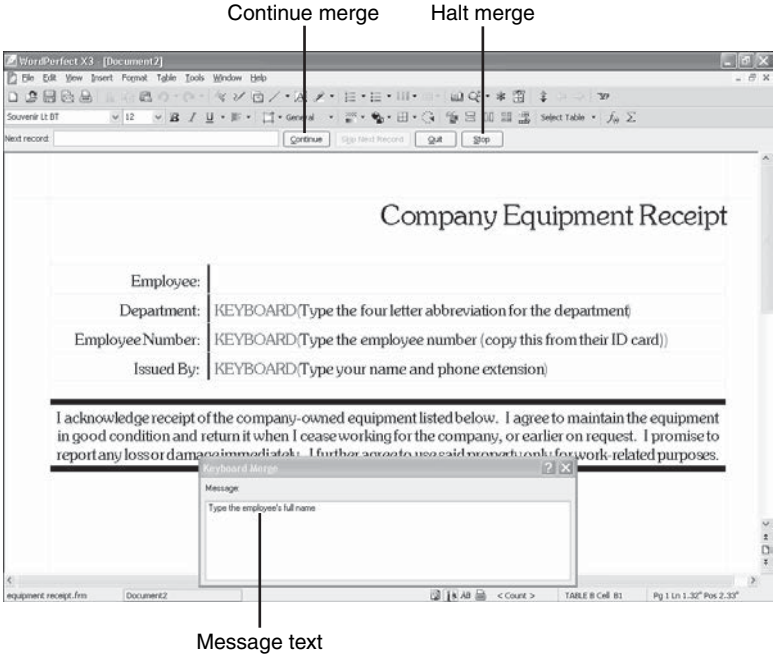


Figure 19.32
The prompt message that you type is displayed in a window at the bottom of the screen.

TIP FROM

You can get the best of both worlds by combining a typical merge of a data file and form document with the flexibility of a fill-in-the-blanks form. Just include keyboard codes in the form document where you want the user to type the information. The rest of the fields can be filled in from the data file.

TROUBLESHOOTING

THIS ISN'T WHAT I EXPECTED

I just did a merge, but I'm not getting the results I need. There are blank spaces where there should be data. I've also got blank lines in the middle of a few addresses.

First, take a good look at the results. Can you detect a pattern? Is the state where the city should be? Are all the last names missing, or just one or two? When you're ready to proceed, close the merge results document without saving.

If you're having the same problem over and over, start with the form document. Make sure you have the right field codes in the right places. If you need to change a field code, select and delete the code, and then reinsert it. Save your changes and try the merge again.

If the problem occurs just in one or two entries, go straight to the data file and take a look at the records that are giving you trouble. Make sure the right information is in the right field.

You might have actually typed the state in the city field by accident. Save your changes and try the merge again.

If the source file is a spreadsheet or a database, you might have to do your proofing in the originating program. If this is inconvenient, consider converting the file to a merge data file so you can edit it in WordPerfect.

I CAN'T ENTER MORE THAN 250 CHARACTERS IN A FIELD

When I use the Quick Data Entry dialog box to enter information into merge fields, I can't enter more than 250 characters. Is there some way I can exceed this limitation?

Actually, it's 255 characters, which is the limit for data entry into fields in the Quick Data Entry dialog box. As a workaround, you can edit the data directly and enter more information. Close the Quick Data Entry dialog box. On the Merge feature bar, click the Go to Data button. If you edit the data file directly, you can exceed the length beyond 255 characters.

WHY DOES MERGE CANCEL OUT QUICKCORRECT?

I've noticed that after I work with the Merge feature, QuickCorrect no longer works. Why is it getting turned off?

QuickCorrect is turned off when certain features are used in WordPerfect X3. This is a "by-design" behavior (I haven't been able to find out why). All you can do is simply turn QuickCorrect back on after you work with merge files. The quickest way to do this is to record a macro that restores the QuickCorrect settings and then attach that macro to a toolbar button.

➔ For more information on recording macros, **see** "Creating Macros," **p. 573**.

➔ For more information on attaching macros to toolbars, **see** "Assigning Macros to Keystrokes, Toolbars, and Menus," **p. 578**.

NOT ALL THE RECORDS ARE BEING SELECTED

I've set up conditions to select a group of files, but not all the records that contain this information are selected. What's going on?

When you set conditions, you have to make sure that you aren't pairing contradictory conditions that in effect cancel each other out. For example, if you search for records that contain a certain city *and* a company name, you won't find any of the records that contain that company name but are in a different city. Because every situation is different, it's a good idea to take a look at the examples. In the Select Records dialog box, click Examples. You can get to a second page of examples by clicking More in the Examples of Selecting Records dialog box.

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CHAPTER 20

Working with Address Books

In this chapter

by Laura Acklen

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Working with the Address Book

The Address Book is a key component in WordPerfect. You can keep track of any type of information: phone and fax numbers, addresses, e-mail addresses, birthdays, personal greetings, job titles, assistant and supervisor names, and so on. You can then use this information with a variety of features. If you have other address books on your system, you will be able to use that contact information in WordPerfect. In fact, if you've been using Microsoft Outlook as your contact information manager, you will be pleased to know that you can use that information in a mass mailing, to print labels and envelopes, and to route documents for review.

Corel has substantially expanded the range of integration with other mail system address books. The Address Book feature integrates with most MAPI services, LDAP servers, the Windows Address Book, and prior versions of CorelCENTRAL and WordPerfect address books.

NOTE

The Address Book is included with the Standard, Professional, and Student & Teacher editions of WordPerfect Office X3. If you received a copy of WordPerfect with a new computer, you might not have access to the Address Book, which is actually a separate program (formerly known as CorelCENTRAL). Not all OEM versions include it because it's the manufacturer's choice to include it on their OEM CDs. If you are interested in using the Address Book, or using the Outlook address book with WordPerfect, you can upgrade to the Standard or Professional version of WordPerfect Office. Contact Corel at 1-800-77COREL for more information.

Opening and Creating Address Books

In WordPerfect X3, you have a choice. You can either use WordPerfect address books (and the WordPerfect MAIL address book), or you can use your Outlook address book. This means that if you already have Outlook on your system and you've been adding information to the Contacts list, you can use that in WordPerfect.

On the other hand, if you don't have Outlook on your system, the WordPerfect address books are a great place to keep your contact information. If you will take the time to enter the information, you will find that you can manipulate it in many different ways. The next several sections discuss creating and editing entries in the Address Book. Outlook integration is discussed in the final section of this chapter, so if you prefer to work with Outlook, you can skip down to that section of this chapter.

Opening WordPerfect Address Books

Let's begin with the WordPerfect address books and cover the Outlook integration later. It will be easier to follow along if your system acts and looks like the system used in the figures. For this reason, I'm going to ask that you turn off the Outlook integration so that when you open the Address Book, you will see the WordPerfect address books.

To turn off Outlook integration, choose Tools, Settings, Environment. If there is a check mark next to the Use Outlook Address Book/Contact list, click the check box to remove it.

Now, let's start the WordPerfect address books and get familiar with them. Choose Tools, Address Book to open the Address Book dialog box (see Figure 20.1).

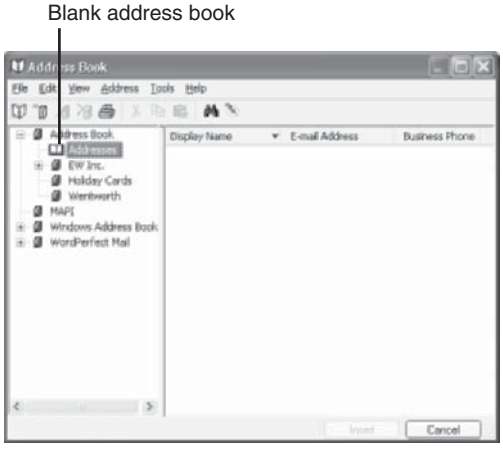

Figure 20.1
An empty address book called Addresses has been created, so you can start adding entries right away.

TIP FROM

If you use the Address Book often, you can add a button to your toolbar that opens the Address Book. Right-click the toolbar to which you want to add the button, and then choose Edit. Choose Tools from the Feature Categories drop-down list, and then select Address Book. Choose Add Button, and click OK.

NOTE

If you are upgrading from WordPerfect version 10, 11, or 12, WordPerfect Office X3 includes a powerful Migration Manager that will transfer over the majority of your settings from the previous installation of WordPerfect Office. This includes address books from previous versions. If the process goes smoothly, you should see your address books when you open the WordPerfect X3 Address Book. If they do not appear, see the section titled "Importing and Exporting Address Book Entries" at the end of this chapter.

ADDING ADDRESS BOOK ENTRIES

The Address Book has gone through several design upgrades so it now stores more information and gives you equal access to other address books on your system. If you're upgrading from a previous version of WordPerfect, you can export those books from the previous version and them import them directly into a WordPerfect address book. See the section "Importing and Exporting Address Book Entries," later in this chapter, for more information.

To open the Address Book and add some entries, follow these steps:

1. Choose Tools, Address Book. The Address Book dialog box opens. By default, the first address book in the Address Book tree is open. You can open another one by clicking the plus sign next to the category, and then clicking the name of the address book (see Figure 20.2).

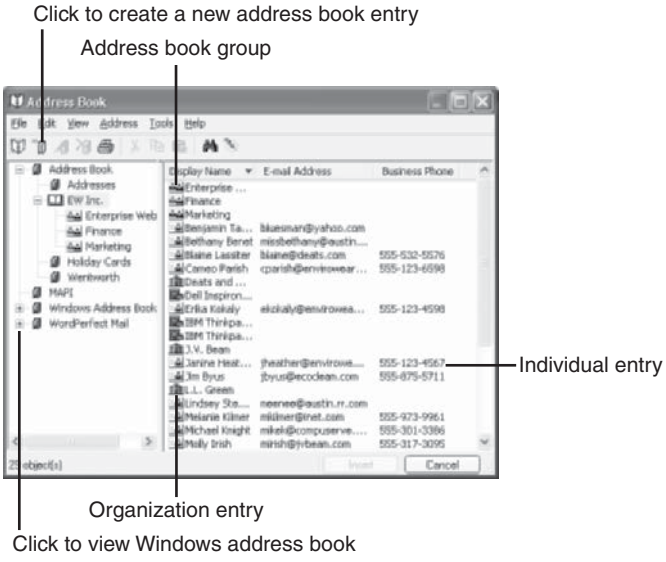

Figure 20.2
The Address Book dialog box gives you access to the WordPerfect address books and other address books on your system.

2. Click the Create a New Address Entry button on the toolbar in the Address Book dialog box. The New dialog box appears (see Figure 20.3).

TIP FROM

If you are creating records for members of the same organization, create the organizations first. As you create the records for the members, you can choose the organization from a drop-down list so you don't have to type it in each time.

Figure 20.3
You can choose the type of address book entry you're creating in the New dialog box.

3. Choose one of the following options:
   - **Person**—This is the most comprehensive entry you can create. There are six tabs where you can organize the information: General, Personal, Address, Phone/Fax, Business, and Security.
   - **Organization**—This is a subset of the Person record, with three tabs: Address, Phone/Fax, and Security.
   - **Resource**—You can maintain records on your company resources by identifying the name and type of the resource, the owner, the main phone number, and comments. A resource might be a conference room, projection unit, videoconferencing equipment, or laptop.
   - **Group**—You can create a group of address book records to make it easier to broadcast messages and general correspondence.

Depending on the type of entry you choose, you get a blank record to fill in. Figure 20.4 shows an entry for a person. Type the information into the fields, pressing Tab to move to the next field and Shift+Tab to move back a field. Click the other tabs to enter data in additional fields.

If you're getting the wrong information from the address book plugged into your templates (via prompts), see "Scrambled Information from the Address Book" in the Troubleshooting section at the end of this chapter.

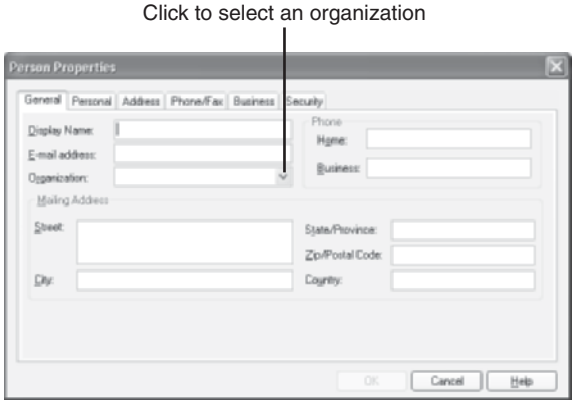

Figure 20.4
The Person Properties dialog box has six tabs to help you organize data for an individual.

CREATING NEW WORDPERFECT ADDRESS BOOKS

WordPerfect address books are designed to store a wide variety of information on individuals, organizations, resources, and groups. You can create books with contact names for each project you are involved in. An address book might be created for your holiday greeting card list, and yet another for the names of the children in your child's classroom. The possibilities are as varied as the people who use it.

To create new WordPerfect address books:

1. Choose File, New, press Ctrl+N, or click the Create a New Address Book button on the Address Book toolbar. The New Address Book dialog box opens (see Figure 20.5).

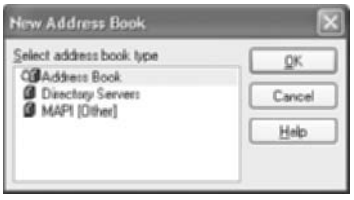

Figure 20.5
You can select the type of address book you want to create in the New Address Book dialog box.

2. Choose Address Book, and then choose OK. The New Address Book Properties dialog box appears.
3. Type a name for the address book, and then choose OK. The new address book is created, and the name appears in the left pane.

OPENING OTHER ADDRESS BOOKS

In addition to using WordPerfect MAIL and Outlook address books, the Address Book lets you access MAPI-compliant (Messaging Application Programming Interface) address books on your computer. For example, if you've created an address book in Microsoft Outlook or Novell GroupWise, you can open and edit it in the Address Book.

You will also be able to connect to and open directory service address books using Lightweight Directory Access Protocol (LDAP). After you open these address books, they will appear in the left pane.

To open a MAPI-compliant address book:

1. Choose File, Open or press Ctrl+O to display the Open Address Book dialog box (see Figure 20.6).
2. Choose Other to display a second Open Address Book dialog box.
3. Select an address book from the Select Address Book list, and then choose OK.
4. Select an address book from the Previously Opened Books list, and then choose OK.

Figure 20.6
Select a previously opened address book from the list in the Open Address Book dialog box.

NOTE

> You won't be able to create a MAPI-compliant address book unless your Windows messaging profile is set up for MAPI. For more information about setting up the Windows messaging profile, see your Windows documentation.

Opening LDAP directory server address books is a two-step process. The first step is to connect to the address book; the second step is to open it.

To connect to and open an LDAP directory server address book:

1. Choose File, New or click the Create a New Address Book button on the Address Book toolbar to display the New Address Book dialog box (refer back to Figure 20.5).
2. Choose Directory Servers from the Select Address Book Type list, and then choose OK.
3. In the Directory Server Properties dialog box, type a name in the Descriptive Name box.
4. Type the URL for the server in the Server URL box.
5. Type a search root in the Search Root text box. If you want to use multiple search roots, be sure to separate them with commas (do not use spaces).
6. Choose a field from the Search Criteria drop-down list.
7. Open the Filter Operator flyout and choose Equal To or Contains.
8. Type the search text in the box next to the Filter Operator flyout.
9. If necessary, type a port number in the Port No box.
10. Choose OK.

NOTE

> For more information on search roots and operators, see "Reference: Using the Address Book" help topic. In the Address Book dialog box, choose Help, Help Topics. Open the Using the Address Book chapter, and then open the Reference: Using the Address Book chapter.

Now that you've connected to the LDAP directory server, you can open the address book so it will appear in the list.

To open an LDAP directory server address book:

1. Choose File, Open to display the Open Address Book dialog box.
2. Choose LDAP from the Select Address Book Type list box.
3. In the Select Address Book dialog box, choose an address book from the Address Books list, and then choose OK.

OPENING THE WORDPERFECT MAIL ADDRESS BOOK

WordPerfect MAIL is a new application included with the Standard and Professional editions of WordPerfect Office X3 and as a separate application. WordPerfect MAIL is a full-featured, easy-to-use program that provides e-mail, calendar, and contact management. It includes innovative filing capabilities, outstanding spam protection, and search functionality that performs at lightning speed.

WordPerfect MAIL has an address book that you can use to maintain your contact information. You can open the WordPerfect MAIL address book in WordPerfect so you can select records for document routing, merge operations, envelopes and labels, and any other occasion where you need to use contact information. Although you can open the WordPerfect MAIL address book in WordPerfect, you won't be able to edit or delete the entries. If you try to do this in WordPerfect, you'll see an error message that says "Functionality not supported." You'll need to do your maintenance tasks in WordPerfect MAIL.

To open the WordPerfect MAIL address book:

1. Click File, Open to display the Open Address Book dialog box (see Figure 20.6).
2. Choose Other to display the Open Address Book dialog box.
3. Choose Personal Address Book, and then choose OK.

When the address book has been opened, you will see a folder labeled WordPerfect MAIL that contains a personal address book (see Figure 20.7). The entries from your WordPerfect MAIL address book can be found in this address book.

Figure 20.7
The WordPerfect MAIL address book can be opened in WordPerfect and accessed when you need that contact information.

USING ADDRESS BOOK INFORMATION IN WORDPERFECT

The beauty of keeping your information in an address book is that you can use it in a document, envelope, or label, whenever you want. A single entry or a series of entries can be inserted in just a few steps. You'll start to see the advantages of maintaining your contact information electronically when you see how easily it can be inserted into your documents.

Keep in mind that you can store all kinds of information in an address book entry, not just name/address/city/state/ZIP. There are almost 50 different fields that can be filled in, including birthday, anniversary, business comments, resource type, and owner to name just a few.

INSERTING INFORMATION INTO A DOCUMENT

When you insert address book entries, you have a chance to choose a format for the information. You can opt for the US Standard; US Standard with Country, Name and Company; or Name, Title, Company.

When you want to insert more than just the basic address information, you can build a customized address format by selecting from a list of more than 50 fields.

Follow these steps to insert an entry (or entries) into a document:

1. Position the insertion point where you want to insert the information.
2. Choose Tools, Address Book.
3. Open the address book that contains the entry you want.
4. Select the entry (or multiple entries).
5. Click Insert in the lower-right corner. The Format Address dialog box appears (see Figure 20.8).

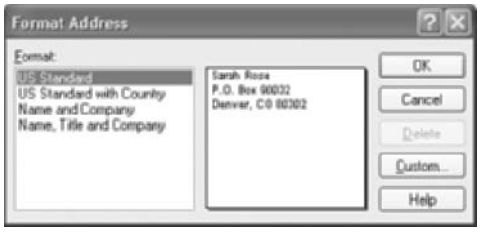

Figure 20.8
In the Format Address dialog box, select a predefined format from the list to see a preview.

6. Select a format in the left pane and you'll see a preview in the right pane.
7. When you find the format you want, select it and choose OK to insert the entry (or entries).

Inserting Address Book Entries onto Envelopes

The steps for inserting address book information onto an envelope are essentially the same as those for inserting the information into a document. The primary difference is that you start by creating an envelope. Another difference is that you cannot insert multiple entries from the Envelope dialog box. You can only insert one entry into the envelope. If you need to do a stack of envelopes, you should use the Merge feature instead.

Follow these steps to insert an address entry into an envelope:

1. Choose Format, Envelope to open the Envelope dialog box.
2. Click the Address Book icon in the Return Address section (to insert a return address) or the Mailing Address section (to insert a mailing address).
3. Open the address book that contains the entry you want.
4. Select the entry.
5. Click Insert in the lower-right corner. The Format Address dialog box appears (refer to Figure 20.8).
6. Select a format for the address book entry.
7. Choose OK to insert the entry.

At this point, you can either print the envelope or append it to the document, whichever you like.

Inserting Information into a Label Form

Here again, the steps for inserting address book information onto a label form are essentially the same as those for inserting the information into a document. The primary difference is that you start by selecting a label form. Unlike envelopes, you can insert multiple entries onto labels. In fact, it's much quicker just to go straight to the address book for a sheet of labels, instead of setting up a merge.

Follow these steps to insert address book information onto a label:

1. Choose Format, Labels to open the Labels dialog box.
2. Select a label form from the list, and then choose Select to insert it into the document.
3. Choose Tools, Address book.
4. Open the address book that contains the entry you want.
5. Select the entry (or entries).
6. Click Insert in the lower-right corner. The Format Address Book dialog box appears (refer back to Figure 20.8).
7. Select a format for the address book entry (or entries).
8. Choose OK to insert the entry (or entries).

If you select more than one address book entry, WordPerfect automatically places each entry on a separate label. It's a favorite feature for ease-of-use and simplicity.

CREATING A CUSTOM ADDRESS FORMAT

As previously mentioned, you can build a custom format to insert those pieces of information that don't appear in the four predefined formats (in the Format Address dialog box). After you create the new format, you give it a name and from then on, it appears in the list of formats in the Format Address dialog box.

Follow these steps to create a custom format:

1. In the Format Address dialog box, choose Custom. The Custom Address Format dialog box appears (see Figure 20.9).
2. Click in the Format box and move the insertion point to the location where you want to insert the field.
3. Select a field from the Fields list.
4. Click the Insert button.
5. When you are satisfied with the results, choose OK.
6. Type a name for the custom format and choose OK. The new format is added to the list in the Format Address dialog box.

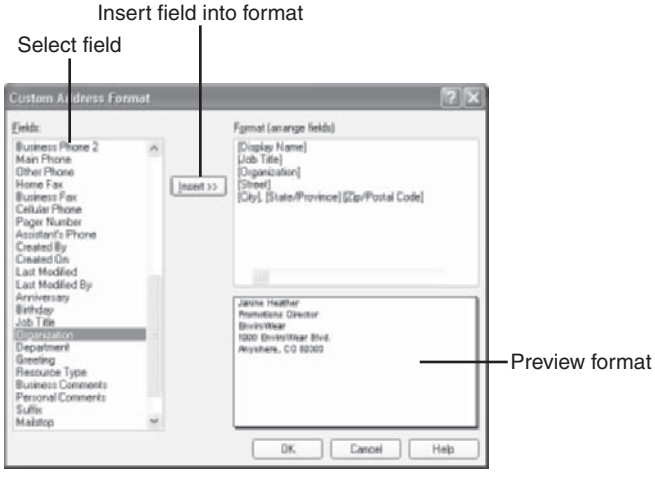

Figure 20.9
Create your own custom format to insert additional address book information.

WORKING WITH ADDRESS BOOK ENTRIES

Creating an address book and typing in the entries is only half the battle. Someone has to maintain the information, right? Your contacts keep changing their cell phone numbers and e-mail addresses, so you have to stay on top of things to keep your information current. Thankfully, working with address book entries is a breeze in WordPerfect. You have many options for editing, deleting (be careful here), moving and copying records between books, printing entries, and searching for information.

After you enter some records, you can do the following:

- **Edit an entry**—You can double-click the person, organization, or resource entries in the list to edit the information. You can also select the entry and then click the Edit an Address Entry button, or you can right-click and choose Edit. Make your changes, and then click OK to save the changes or Cancel to discard the changes.

- **Delete an entry**—You can select one or more entries, and then press Delete. You can also click the Delete an Address Entry button. Or, you can right-click the selection and choose Delete. If a Do You Want to Delete message box appears, choose Yes to delete the entry (or entries).

CAUTION

> You're working without a safety net when you delete records in the Address Book because there is no way to restore an entry that you've deleted in error. The same holds true for deleting an entire address book. The only way to recover an accidentally deleted address book is if you can restore the files from a backup. One more reason to back up regularly–so a recent copy of your address book is secure.

- **Move entries to another address book**—You can select the entries in the list, and then click and drag them over to another address book (in the list in the left pane).
- **Copy entries to another address book**—Select the entries, and then choose Edit, Copy, or right-click the selection and choose Copy. Open the other address book, and then choose Edit, Paste, or right-click in the right pane and choose Paste. You can also hold down the Ctrl key while you drag the address, or selected addresses, to another address book.

- **Print entries**—You can print the current record, selected records, or all the records. Select one or more records, and then click the Print button on the toolbar or press Ctrl+P to open the Print dialog box.

- **Search for text in the Display Name**—This search tool will locate information in the display name field. Select an address book, and then click the Search for Specified Text button, or choose Edit, Find to open the Find dialog box. Type the text you want to search for, and then click OK. To search for information in the first name, simply type the name. If you want to search for last names (or anything beyond the first name), type an asterisk (*) before the search text. Records that contain the search text will be shown in an expanded dialog box (see Figure 20.10).

- **Send e-mail**—You can select an address book entry, and then choose Tools, Send Mail (or click the Send Mail button) to start composing a mail message. If there is an e-mail address in the selected record, it's automatically inserted into the message. You can finish creating the message, and then send it as you normally would.

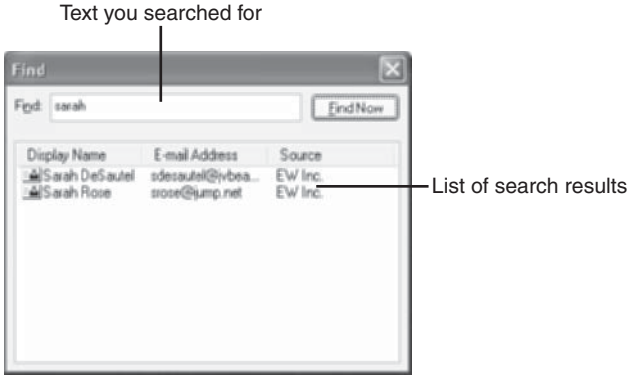

Figure 20.10
In the Find dialog box, you can type the text you want to search for in the address book records.

NOTE

> When you send e-mail from the Address Book, you are using the default MAPI-compliant e-mail program set up in the Windows messaging profile. For more information on MAPI, see the help topic titled "Reference: Using the Address Book." For more information on installing Windows messaging and creating Windows messaging profiles, consult the Microsoft Windows documentation.

- **Publish an address book to HTML**—You can publish your address books to HTML for publishing on the Web, or on a company intranet. Select a book, and then choose File, Publish to HTML to display the Publish to HTML dialog box (see Figure 20.11). Make your selections in the Layout and Range sections. Place a check mark next to the fields that you want included in the Columns to Publish list. If you want to include contact information at the bottom of the HTML file, click the Banner/Signature tab. Enable the Send Comments To check box, and then type your name in the text box. Enable the E-mail Address check box, and then type your e-mail address in the text box. In the Location tab, choose the drive and folder where you want the file saved. Type a filename in the Filename Prefix text box, and then choose OK.

Figure 20.11
Make your selections to build the HTML file in the Publish to HTML dialog box.

- **Open existing address books**—You can open another address book in the list by clicking the plus sign next to the category. For example, to access the Outlook Express address book, click the plus sign next to Windows Address Book, and then click the Contacts book. You can add your other address books to the list by opening them in the Address Book. Choose File, Open to display the Open Address Book dialog box (refer back to Figure 20.6), which shows a list of previously opened books. Click the CorelCENTRAL button to open other CorelCENTRAL books (you'll have the capability to browse for the files). Click the Other button to open address books that have not been opened previously and that are not CorelCENTRAL books (that is, WordPerfect MAIL Address Book).

If you can't open a MAPI address book, or if you are getting the error message, MAPI address books will not be available. Please check the information services setup in the active user profile and your installation of Windows messaging. See "I Can't Open a MAPI Address Book" in the Troubleshooting section at the end of this chapter.

If you don't see all of your address books in the list, see "Some of the Address Books Are Missing" in the Troubleshooting section at the end of this chapter.

- **Set access rights to an address book**—You can set the access rights to an address book so that others have limited access. You can set an address book as hidden, so it cannot be seen by others, or read-only, so it can be viewed by others, but not modified. Select an address book, and then choose File, Rename. In the Security tab, enable the Hidden and/or the Read-only check boxes.
- **Set access rights to an address book entry**—You can set the access rights to a specific address entry so that others have limited access. You can set an entry as hidden, so it cannot be seen by others, or read-only, so it can be viewed by others, but not modified. Select an address book entry, and then choose Address, Edit. In the Security tab, enable the Hidden and/or the Read-only check boxes.

TIP FROM

Laura Acklen

Your contact information is an invaluable resource and should be protected. It's extremely important that you make backup copies of your address books. A good time to do this is right after you make changes to the entries. To back up your address books, use the Import/Export Expert to export the books. You can only export one book at a time, so plan on repeating the steps for each address book. You might need these files if you decide to move your address books to another machine, or if you are uninstalling and reinstalling WordPerfect.

CUSTOMIZING THE ADDRESS BOOK WINDOW

The default display settings in the Address Book window won't always show you what you need to see, so you might want to alter the display to make it easier to find information. You can do this in several ways: You can change the column headings and display different fields, or you can sort the records to group certain records together. You can also set a filter and specify what criteria must be met for a record to be displayed.

SELECTING WHICH COLUMNS TO DISPLAY

By default, the Address Book window shows you the Display Name and Email Address fields for the entries. This information is helpful, but not very comprehensive. You can add columns to the Address Book window so you can see more information from the entries.

Note that you won't be able to remove the Display Name field from the Address Book window. The Display Name field is mandatory and, as you saw earlier, the only one that can be searched to quickly locate records.

To change the fields (columns) displayed in the records list:

1. Right-click a column heading to display the Columns dialog box. A list of all the fields appears (see Figure 20.12). These settings can vary among address books.
2. Place a check mark next to each of the fields that you want to see listed. These settings "stick" with the address book, so you can customize the display of fields for each address book.

Figure 20.12
You can mark the fields that you want displayed in an Address Book list in the Columns dialog box. These settings can vary among address books.

SORTING ADDRESS BOOK ENTRIES

Sorting address book entries is one way to group related records together. After they are grouped together, you can quickly select them and work with the entries as a group. For example, you might want to work with only those records in a certain state. Sorting in ZIP/Postal Code order can help you organize your entries for a bulk mailing.

Follow these steps to sort the address book entries:

1. Click the column heading for the field by which you want to sort. You can now select the sorted records for printing, e-mail, or merging. For example, you can print labels in ZIP Code order if you sort the records by ZIP Code before selecting them.
2. Click the column heading again to reverse the sort (ascending to descending and vice versa). The arrow on the column heading shows you which direction the sort is done.

CAUTION

> If you sort the address book entries, and then exit the Address Book and try to use the sorted entries in a merge, the sort won't stick. If you want to use sorted entries in a merge, you need to convert the address book to a merge data file and then sort it. See the section "Importing and Exporting Address Book Entries" later in this chapter for more information.

FILTERING ADDRESS BOOK ENTRIES

If you have an especially large address book and you want to be able to view only a certain group of entries, such as everyone at Acme, Inc., you need to filter the entries. Filtering means that you tell the Address Book to show only the entries that include specific criteria, such as a company name such as Acme, Inc.

The rest of the entries in your address book seem to "disappear" when the entries are filtered; however, they are all still in the address book. They are just not being displayed. After you finish viewing the specific entries for Acme, Inc., you can remove the filter, and all your entries will be visible again.

To set a filter for address book entries:

1. Choose View, Filter to display the Filter dialog box (see Figure 20.13).

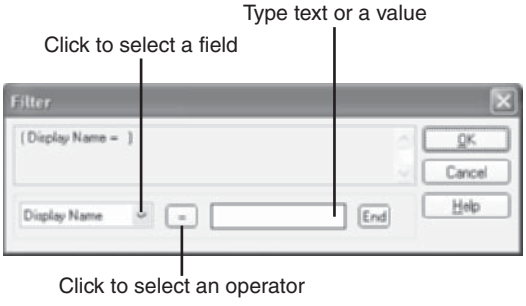

Figure 20.13
In the Filter dialog box, you can specify the criteria that must be met for the record to be displayed in the list.

2. Click the first drop-down list arrow and choose a field. These fields are the column heading names, and you are choosing the one that you want the entries to be filtered by.
3. Click the operator button between the list box and the text box. Until you change it, the button has an equal sign on it.
4. Select an operator from the list. The operators are used to narrow down the list. For example, you can filter out all the records with a `Zip/Postal Code of Greater Than 80300`.
5. Type the text or value that you want to use as a filter in the text box, and then click OK. To continue the example in step 4, you would enter **`80300`** as the Zip/Postal Code value. The program refreshes the list and displays only those records that meet the criteria.

CAUTION

The Filter and/or Remove Filter commands might not be available (they are grayed out). Choose View, Refresh if that happens and they should become available. Also, after you apply a filter, it stays there until you remove it. If you apply a filter and then close the Address Book, when you reopen it, the filter is still in place. You won't see a full list of records until you remove the filter. To switch back to the full list, choose View, Remove Filter.

IMPORTING AND EXPORTING ADDRESS BOOK ENTRIES

Now that you know you can keep all of your contact information in one place, the question becomes "How can I get everything into the Address Book?" or "How can I transfer my address book information into other applications?"

The answers are as varied as the different programs that you can use to create and maintain contact information. You have a lot of options, so you're sure to find a way to get the information in (import) or copy the information out (export).

Unfortunately, space considerations don't permit detailed steps for every type of import or export operation. The following list of general concepts for importing and exporting should get you moving in the right direction:

- **Using the Import/Export Expert**—Corel designed this expert to walk you through the process of importing and exporting information. You can import address books from previous WordPerfect versions in the Corel Address Book 8 (`.abx`) format, text file format (`.csv`, `.txt`), and Outlook 97/98/2000/XP. You can export your address books to text file format (`.csv`, `.txt`) and Outlook 97/98/2000/XP. Keep in mind that you must first create a blank address book to import the addresses into.

TIP FROM

If you export your Outlook Contacts to a .csv file first, you can import all of the data, rather than just the name and e-mail address in a straight import. You're presented with a field mapping section so it's just a matter of matching up fields where you have data in Outlook Contacts to similar fields in Address Book. There aren't as many fields in the Address Book as there are in Outlook Contacts, so you might consider creating different address books for different fields. For example, you can create an address book specifically for the home phone and address information and another for the business phone and address information. Outlook lets you maintain multiple home/business addresses (and other contact information) for each contact, so you can bring all of that information into Address Book by doing separate imports for those sets of data. One small caveat: Group records cannot be imported or exported, so you'll have to manually re-create them.

- **Importing a merge data file**—If you want to add names and addresses that you have stored in a merge data file to an address book, you can convert the merge data file into a text file and import the text file into an address book. If the records are in a list (not a

table), you need to delete the FIELDNAMES code and then replace the semicolon after each field name with an ENDFIELD code, and a hard return. You can do this with Find and Replace if you like. If the records are in a table, you can open and save the file as text without making any changes. In the Save As dialog box, choose ASCII (DOS) Delimited Text from the File Type drop-down list and then save the file. Now, you can import this .txt file directly into the address book.

- **Importing spreadsheet and database files**—Use the steps in the "Converting to WordPerfect Formats" section of Chapter 13, "Importing Data and Working with Other Programs," to save a spreadsheet or database file as an ASCII text file, which you can import directly into the Address Book. During the import process, you'll be able to "map," or match up, the field names from the ASCII text file with the address book field names, so you can be sure that the information from the text file is inserted in the right places.

If you get the error message "Invalid Field Name" when trying to import a data file into the Address Book, see "Invalid Field Name Error Message" in the Troubleshooting section at the end of this chapter.

- **Importing other address books**—In most cases, you will be able to export addresses from another address book (such as Outlook Express) into an ASCII (or comma-delimited) text file, which can be imported directly into a WordPerfect address book. During the import process, the field names used in the other address book will be listed next to the fields in the WordPerfect Address Book. After you've matched up the field names, you can import the data.
- **Importing Netscape address books**—Netscape's address books can be brought into the Address Book by exporting from Netscape as a .csv or .txt file. Unfortunately, Netscape fails to insert the field names at the top of the file. You'll have to open the file in a text editor and add the field names manually before you can import it into a WordPerfect address book.
- **Exporting to an ASCII text file**—If you want to use WordPerfect address book data in another program, the universally accepted format is ASCII. After you've exported an address book to Text file (*.csv, *.txt), you can open, or import, the .txt file in another application.
- **Exporting to a merge data file**—The adrs2mrg macro that ships with WordPerfect converts an address book into a merge data file. The merge data file is not in table format, but it will have a field name record at the top.

CAUTION

There is an issue with the All Records option in the Address Book to Merge dialog box that appears when you run the adrs2mrg macro. As a workaround, choose Select Records instead. You'll be able to choose your address book and then select records. If you click on a record, and then press Ctrl+A, you'll select all the records at once. Click the Insert button on the bottom-right corner, and then choose a format to perform the export.

➔ To find out where the `adrs2mrg` macro is and how to run it, **see** "Running the Shipping Macros," **p. 570**.

➔ For the steps to insert a code in the Find and Replace dialog box, **see** "Searching for Codes," **p. 128**.

NOTE

> The location of the address books is different in different versions of WordPerfect, so the general rule is that you should export your books before an upgrade. After you have installed the newer version, you can import the address books from the previous version. This isn't always necessary, but it's almost foolproof.

- **Using WordPerfect 10/11/12 Address Books**—In some cases, the address books will not show up in the Address Book after an upgrade. If you didn't make backup copies of your address books before the upgrade, you'll need to reinstall WordPerfect 10/11/12 so you can use the Import/Export Expert to export the books. The best method is to export the books in CSV format. When you've exported all your books, you can uninstall WordPerfect 10/11/12, and then start WordPerfect X3 and use the Import/Export Expert to import the books.
- **Using WordPerfect 9 Address Books**—You should be able to open the address books directly and use them just as you would any other address book. The WordPerfect 9 address books are found under the CorelCENTRAL button in the Open Address Book dialog box (refer back to Figure 20.6).
- **Using WordPerfect 8 Address Books**—If CorelCENTRAL8 is still installed on the system, address books can be opened under the MAPI tree. Choose File, Open, Other; then, select one of the CorelCENTRAL8 books (such as My Addresses or Frequent Contacts). If you have already removed CorelCENTRAL8, but you have exported the files to ABX format, you can import them into a WordPerfect Address Book using the Import/Export Expert. Note that you might not be able to import the custom field data into the WordPerfect Address Book.
- **Importing WordPerfect 7 Address Books**—Before you uninstall WordPerfect 7, you should export the addresses in WordPerfect 7 to an ABX file and then import the ABX file into a WordPerfect Address Book with the Import/Export Expert. If you have trouble importing an ABX file from WordPerfect 7, try changing the extension of the ABX file to CSV in Explorer or My Computer and then try the import again.

If you cannot import previous address books into WordPerfect Productivity Pack, see "Cannot Import in the Productivity Pack Version" in the Troubleshooting section at the end of this chapter.

INTEGRATING WITH MICROSOFT OUTLOOK

WordPerfect X3 offers some improvements to integration with Microsoft Outlook address books. You can use entries in the Outlook address book for document routing and review, printing labels and envelopes, and merge operations. As mentioned earlier, you have to make a choice. You can either work with the entries in the WordPerfect address books

(including the WordPerfect MAIL Address Book), or the Outlook address book, but not both at the same time.

From the names, you would think that Outlook and Outlook Express were the same type of application. They are not. Outlook is a Personal Information Manager and Outlook Express is an e-mail/news reader. They both have address books, but they are completely separate from each other. You can work with both address books in WordPerfect, using two different methods.

You will be able to open the Outlook Express address book in the WordPerfect Address Book. The entries will appear in the Contacts folder under Windows Address Book. The Outlook address book is opened when you activate Outlook integration.

OPENING THE OUTLOOK ADDRESS BOOK

When you're ready to work with the Outlook address book, you will need to "turn on" Outlook integration. To switch back to the WordPerfect address books, you have to turn Outlook integration back off.

Follow these steps to enable Outlook integration:

1. In WordPerfect, choose Tools, Settings, or press Alt+F12.
2. Choose Environment.
3. Click the Use Outlook Address Book/Contact List check box to activate this feature.
4. Choose OK, and then Close to return to the document.

When you enable the Outlook integration, Outlook "takes over" the address book. When you open the address book, you will get the Outlook Address Book dialog box. The WordPerfect address books are not available at this point.

Follow these steps to open the Outlook address book/contact list:

1. Choose Tools, Address Book. The first time you use the Outlook address book, you will have to specify a profile in the Choose Profile dialog box (see Figure 20.14).

Figure 20.14
After you identify your profile, the Outlook Address Book will open when you choose Tools, Address Book.

2. Either select a profile from the drop-down list or choose OK to use the default profile. The Outlook Address Book dialog box appears (see Figure 20.15) .

Figure 20.15
The Outlook Address Book dialog box shows the entries in alphabetical order by name.

CAUTION

To integrate with the Outlook address book, WordPerfect has to be able to interface with that application. The Microsoft Windows standard for electronic messaging is called MAPI. Microsoft limits the contacts available under MAPI to those that contain an e-mail address or fax number. For this reason, only the entries that have an e-mail address or fax number will appear in the Outlook Address Book dialog box. If you don't have a fax number, enter a space or "dummy" character in the Fax field. Incidentally, Microsoft also controls what is placed in the Display Name field.

TIP FROM

Your contact information is an invaluable resource and should be protected. It's extremely important that you make backup copies of your address books. A good time to do this is right after you make changes to the entries. For more information on how to back up your Outlook address books, see the Microsoft Knowledge Base article #287070. Go to `http://support.microsoft.com` and enter the article number.

If you get an error message when you try to set Outlook as your default e-mail client, see "Error When Setting Outlook As the Default Mail Client" in the Troubleshooting section at the end of this chapter.

Troubleshooting

Scrambled Information from the Address Book

I want to use my customized WordPerfect templates in a new version of WordPerfect. Most of them work just fine, but when a prompt is linked to an address book field, the wrong information is being inserted into the template.

Some of the field names were changed in the WordPerfect address books, so you probably need to rebuild your prompts and link them to the proper fields. In WordPerfect X3, open the template for editing. Delete the prompts that are linked to address book fields, and then reinsert them. Click Build Prompts, and then choose Add. In the Add Template Prompt dialog box, select Show All Available Fields. Type the prompt, and then choose the correct field from the list. Make sure that you save these changes.

I Can't Open a MAPI Address Book

I'm trying to open an existing address book, but I don't see MAPI in the list. Sometimes I also get a MAPI error message when I try to open an address book or work with the Merge feature.

First of all, try opening the address book using File, Open, MAPI, and then selecting the address book from the list. If this doesn't work, you need to look at the type of MAPI mail client you have installed on your system.

For the Address Book to access MAPI-compliant address books, you must have an extended MAPI mail client installed and the extended MAPI version of MAPI32.DLL must be active. Extended MAPI mail clients include Outlook 97/98/2000/2003 (in CW mode); Groupwise, the basic messaging client installed with Windows NT 4, and some configurations of Notes; and many other e-mail clients. If you have Outlook Express, Netscape, or Eudora installed on your system, the simple MAPI version of MAPI32.DLL may be active, and you won't be able to access the MAPI-integrated address books from WordPerfect.

TIP FROM

> You can right-click your `mapi32.dll` file and check the Version tab to determine whether your file is extended or simple MAPI—if it's extended MAPI, it will say so in the description.

In Netscape, you can usually disable the simple MAPI by changing your preferences. Choose Edit, Preferences, click Mail and Newsgroups, and then deselect the Use Netscape Messenger from MAPI-based Applications check box. As long as you have a version of extended MAPI on your system, when you reboot, the simple MAPI file will be replaced.

In Outlook Express, choose Tools, Options. Click the General tab, and then deselect the Make Outlook Express My Default Simple MAPI Client check box. Choose OK twice, and then reboot your computer.

NOTE

> You can also go into Control Panel, Internet (or Internet Options), Programs and select Microsoft Outlook (or any other application that supports Extended MAPI) from the E-mail drop-down list. This sets Outlook as the default mail client, which might be necessary for you to be able to see your MAPI address books. Make sure you choose Apply before you choose OK.

Extended MAPI/Messaging will be installed with the following operating system configurations: Windows NT 4.0, Windows 98, or Windows 2000 only if those were installed as updates to a system running Windows 95 or Windows NT (in which case the functionality will be retained from the prior 95/NT installation), Windows with Outlook in CW mode (if installed in Internet Mail Only mode you get only simple MAPI), Windows with Exchange Administrator (Exchange 5.5) or Exchange System Manager (Exchange 2000) installed, and Windows with MS Exchange Server. Windows XP/2000 users will not have extended MAPI or messaging as part of the operating system; they will have to download or order a messaging update from Microsoft, or install a third-party mail client.

Some of the Address Books Are Missing

Not all the address books are listed in the Address Book dialog box. Where did they go?

The address books may very well be present on your system—they just haven't been opened yet. In the Address Book dialog box, choose File, Open. Either select one of the previously opened address books, or click the CorelCENTRAL button to choose another WordPerfect address book, or click Other to browse your system for other address books. After you open an address book in WordPerfect, it will appear in the list of address books.

Also, new address books can be marked as Hidden (or Read-Only) as a security measure to protect against unauthorized access. If an address book is marked as Hidden, it won't appear to users who log on to that machine. If it's marked Read-Only, users won't be able to modify the records.

Invalid Field Name Error Message

I'm trying to import a data file in the Address Book, but I get an error message that says there is an invalid field name. What does this mean?

You probably have some punctuation in one of the field names. Open the data file and remove any punctuation marks from the field names. For example, if one of your field names is "City, State ZIP," the Address Book sees the comma as a field separator so the City field is assumed to be one field and the State ZIP field to be another. Save the file and try the import again.

Cannot Import in the Productivity Pack Version

When I bought my new computer, it came with WordPerfect Productivity Pack. I am trying to import an address book from a previous version of WordPerfect, but the Import/Export Expert option on the File menu is unavailable. Is there any way to get this address book into WordPerfect?

WordPerfect Productivity Pack doesn't support importing and exporting address books. Because it is included free with new computer systems, some of the functionality has been disabled to encourage you to upgrade to the full version. After all, if none of us purchase the full version, WordPerfect will cease to exist.

That said, there is a workaround. If you have Outlook Express on your system, you can use it to import your book so it will be available under the Windows Address Book tree. Start Outlook Express, and then click on Tools, Address Book. Choose File, Import, Other Address Book. Select the format for the import file, and then choose Import. Browse to your address book and select it. Check to make sure the fields are mapped correctly, and then click Finish. Close the address book, close Outlook Express, and start WordPerfect. Choose Tools, Address Book to start the WordPerfect Address Book (if you haven't already, disable Outlook integration for this). In the left pane, open the Windows Address Book tree. Select Contacts to see your imported entries.

Error When Setting Outlook As the Default Mail Client

When I open the WordPerfect Address Book, I am prompted to set Outlook as the default mail client. The problem is that after I click Yes, I get the following error message: `Microsoft Outlook: Either there is no default mail client or the current mail client cannot fulfill the messaging request. Please run Microsoft Outlook and set it as the default mail client.` *Now what do I do?*

This can happen if the Outlook files are damaged, or if another mail program is running (such as Outlook Express or Mozilla), and you set Outlook as the default client. There are several steps you can try to resolve the issue.

- **One**—Close all open applications, including WordPerfect. Open WordPerfect and try setting Outlook as the default mail client again within WordPerfect. In other words, repeat your steps and see if it works this time.
- **Two**—Close all open applications, including WordPerfect. Open Microsoft Outlook and set it as the default mail client. Refer to the Outlook documentation for the steps to do this for your specific version of Outlook. Open WordPerfect and try to open the Address Book again.
- **Three**—Refer to the Microsoft Knowledge Base article #813745 for steps to repair Microsoft Outlook. Go to `http://support.microsoft.com` and enter the article number.
- **Four**—Disable Outlook integration from within WordPerfect and use the WordPerfect Address Book instead. Choose Tools, Settings, Environment, and then uncheck the Use Outlook Address Book/Contact List option.

CHAPTER 21

USING EXPERTS AND MACROS

In this chapter

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USING THE PERFECTEXPERT

In Chapter 18, "Building Documents with Templates," you learned how to use the PerfectExpert project templates to build specific types of documents. In this chapter, you'll learn how to use the "generic" PerfectExpert, which can guide you through the creation of all sorts of different documents. You can create documents with tables, columns, bulleted and numbered lists, graphics, shapes, borders, charts, outlines, headers, footers, page numbers, and so on. All the common formatting options, such as changing the margins, choosing fonts, setting tabs, using Make It Fit, adjusting line spacing, inserting symbols, and marking text, are available at the click of a button. You can even get to the document collaboration and proofing tools. In short, "It's in there."

To start the PerfectExpert, click the PerfectExpert button or choose Help, PerfectExpert. The PerfectExpert panel appears on the left side of the screen (see Figure 21.1). You might recall from Chapter 18 that you click the panel buttons to choose additional options. The buttons with a down-facing arrow display pop-up menus.

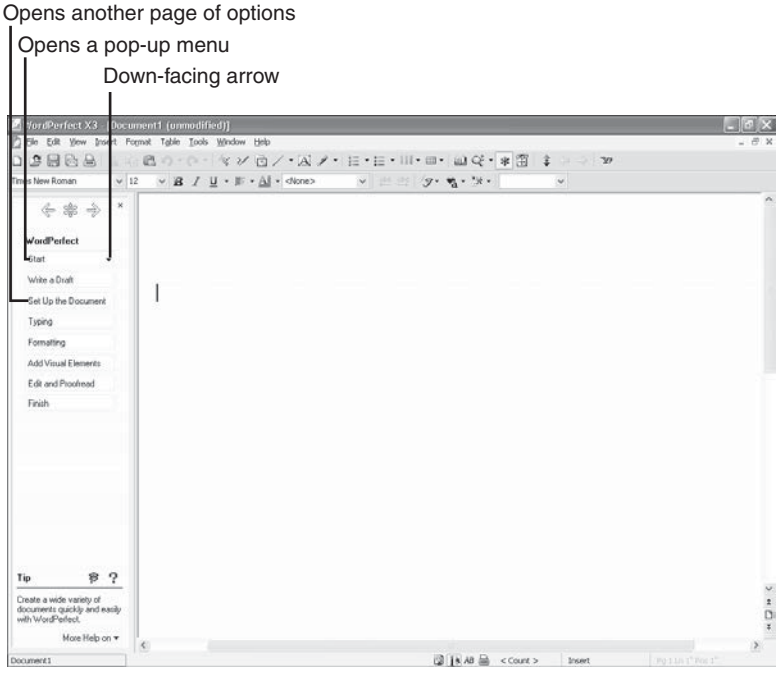


Figure 21.1
The PerfectExpert panel has buttons that open pop-up menus and other pages with additional options.

Clicking a panel button opens another page with more options (see Figure 21.2). If you want to move back to the previous page, click the Go Back button. As you continue to work in the PerfectExpert panel, the Go Forward button will become available.

Clicking the mortarboard button launches your Internet browser (if available) and takes you to Corel's Learning Center on the Web. As of this writing, the link takes you to the `wordperfect.com` site, but that may change as more resources for WordPerfect X3 become available.

Clicking the question mark button opens the Help Topics dialog box, where you can search for information on a particular feature.

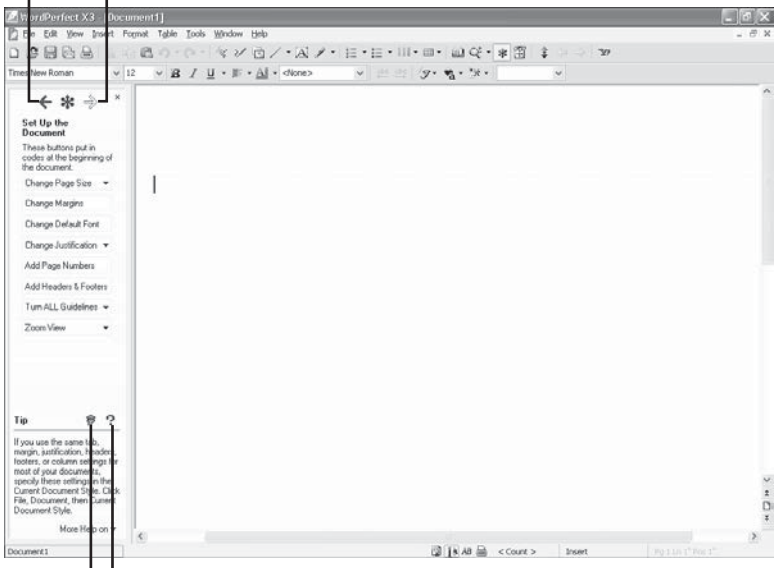


Figure 21.2
The Set Up the Document page has buttons for frequently used formatting commands.

By default, you are set to create the new document in a blank document window. You can, however, use the PerfectExpert to edit an existing document or project template. To do so, click the Start button in the PerfectExpert panel and choose New Project/Existing Document. In the PerfectExpert dialog box (see Figure 21.3), you can choose from the list of project templates or you can click the Work On tab and choose from a list of previously edited documents (work in progress).

➔ To learn more about using project templates, **see** "Using WordPerfect's Templates," **p. 472**.

I've kind of saved the best for last, but you *have* to see what happens when you open the PerfectExpert panel in an existing document. Let me give you a quick example. With the PerfectExpert panel displayed, I opened a newsletter. When I click in various parts of the newsletter, the PerfectExpert panel pages change to display options that are relevant for the feature used for that section of the newsletter. When I click on a table, I get the Table page; when I click on a title, I get the Title Look page; when I click in the newsletter text, I get the Newsletter page. And so on and so forth.

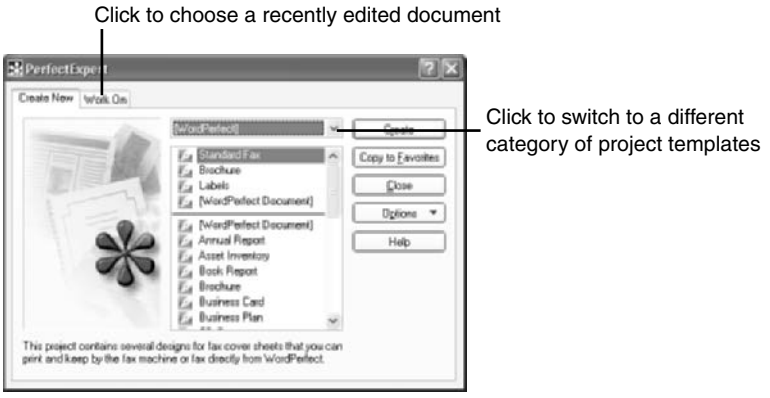


Figure 21.3
You can open a project template, or a recently edited document, in the PerfectExpert dialog box.

NOTE

> This feature is perfect for the new (or timid) users because it is literally point-and-click document generation. All users have to do is click the PerfectExpert button to open the PerfectExpert panel where they can click buttons to get menus and dialog boxes that they might not have been able to find on their own.

USING THE PLEADING EXPERTS

NEW Introduced in WordPerfect 11 and included in WordPerfect X3, the pleading experts help you put together pleading documents quickly and easily. In general terms, a pleading is every legal document filed in a lawsuit, petition, motion, or hearing. They set out the facts and legal arguments that support that party's position. Pleadings are required by state or federal statutes and court rules to be in a particular form and format: typed, signed, and dated with the name of the court, title, and number of the case, and contact information for the attorney or person acting for him/herself included. In other words, pleading documents are created for virtually every type of case and must follow a strict set of formatting rules.

NOTE

> The Legal Tools are not installed during a typical installation. If you don't have a Legal Tools option on your Tools menu, they haven't been installed yet. Choose Start, Control Panel, Add/Remove Programs. Select WordPerfect Office X3, and then click the Change button. Choose Change Which Program Features Are Installed, and then click Next. If necessary, click the plus sign next to WordPerfect Office X3 to open the tree. Click the plus sign next to WordPerfect. Click the button next to Legal Tools and choose This Feature Will Be Installed on Local Hard Drive. Choose Next, and then Begin. Choose Finish to close the Install Wizard.

Over the years, WordPerfect's pleading tools have evolved from a simple macro to create pleading papers to a full set of pleading creation experts that guide you through the entire process. First, you use the Pleading Expert Filler to enter the case information. Then, you

use the Pleading Expert Designer to customize the pleading styles so your pleading documents conform to the filing requirements for your region.

TIP FROM

If you just need to whip up a quick pleading document, you can do this with a pleading macro. Either click the Pleading button on the Legal toolbar, or choose Tools, Macro, Play (Alt+F10), and double-click `pleading.wcm` in the list. Make your selections in the Pleading Paper dialog box, and then choose OK to create the blank pleading paper.

USING THE PLEADING EXPERT FILLER TO CREATE CASES

The first step to produce pleading documents is to set up the cases. New cases can be created from scratch, or you can create new cases based on existing cases. The case information is easily updated when it changes, so go ahead and get started with your cases by running the Pleading Expert Filler.

To create a new case with the Pleading Expert Filler

1. Choose Tools, Legal Tools, Pleading Expert Filler, or click the Pleading Expert Filler button on the Legal toolbar. The Pleading Expert Filler appears (see Figure 21.4).

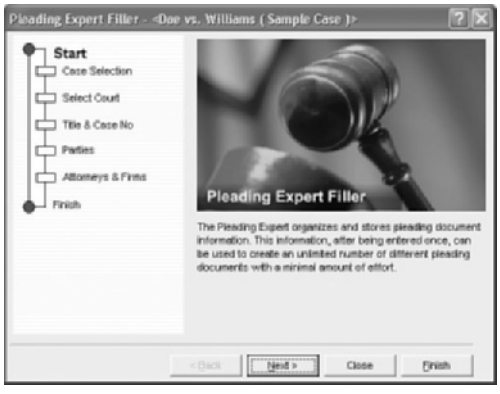


Figure 21.4
The Pleading Expert Filler walks you through the process of creating and editing cases.

2. Choose Next to move to the Case Selection section (see Figure 21.5).
3. Enable the New Case option and type a name for the case in the New Case Name text box.
4. Choose Next to move to the Select Court section.
5. Select the pleading style that you want to use and type the judge's information.
6. Choose Next to move to the Title & Case No. section.
7. Enter the relevant information here, and then choose Next to move to the Parties section.

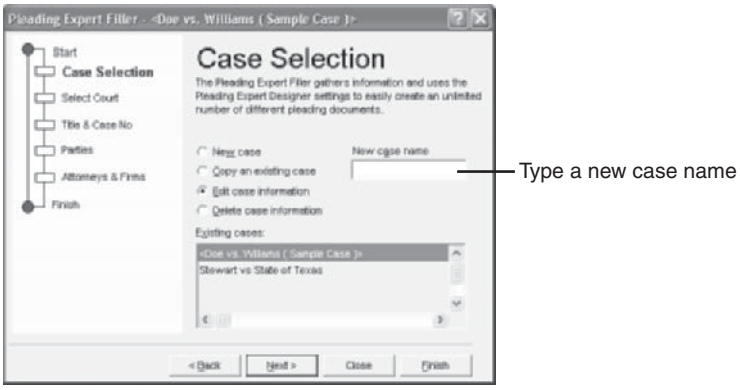


Figure 21.5
In the Case Selection section, you can create new cases and edit existing cases.

8. Select which parties are involved and enter the name(s) of the parties.
9. Choose Next to move to the Attorneys & Firms section.
10. Enter the contact information for the attorney(s).
11. Choose Next, and then Finish. WordPerfect generates the pleading document (see Figure 21.6).

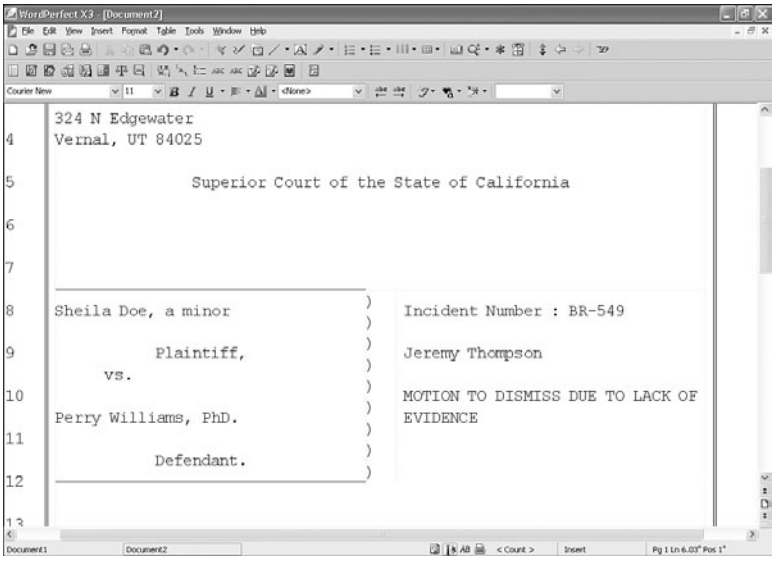


Figure 21.6
The completed pleading document has all the information you typed in, in the correct place and in the correct format.

When you need to edit a case, you do so through the Pleading Expert Filler. Keep in mind that you can create new cases based on existing cases. You will save yourself some time entering the contact information.

To edit an existing case with the Pleading Expert Filler

1. Choose Tools, Legal Tools, Pleading Expert Filler, or click the Pleading Expert Filler button on the Legal toolbar. The Pleading Expert Filler appears (refer back to Figure 21.4).
2. Choose Next, and then select the case you want to edit from the Existing Cases list.
3. Choose Next to start working through the different sections, making your changes as necessary.

All the steps necessary to complete a pleading are listed on the left side of the Pleading Expert Filler. You can click any of the items in the list to jump to that particular section.

CREATING AND EDITING PLEADING STYLES

The preceding steps illustrate the creation of a pleading document using one of the two built-in styles. Specifically, Style 1 was used, with some modifications, to create the document shown in Figure 21.6. You can create your own pleading styles and select them from the list.

Creating your own custom pleading styles is a key piece of the puzzle, and it has been completely automated to save you time. The Pleading Expert Designer walks you through the entire process.

To create a new pleading style with the Pleading Expert Designer

1. Choose Tools, Legal Tools, Pleading Expert Designer, or click the Pleading Expert Designer button on the Legal toolbar. The Pleading Expert Designer appears (see Figure 21.7).

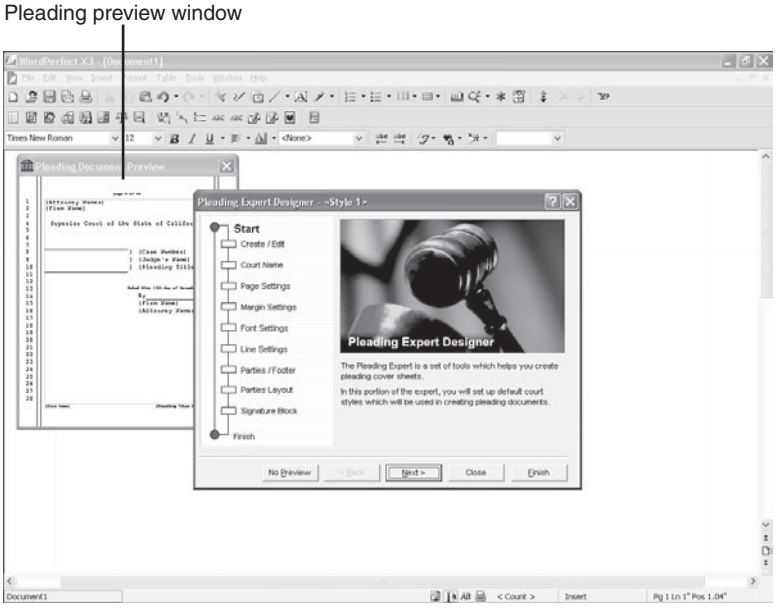


Figure 21.7
The Pleading Expert Designer walks you through the process of creating your own pleading styles.

2. Choose Next to move to the Create/Edit Pleading section (see Figure 21.8).

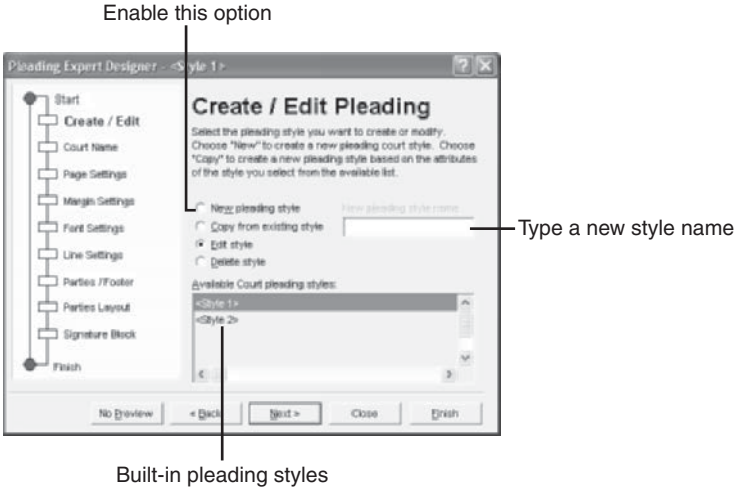


Figure 21.8
Select a style to edit, or type a new style name to create a new style in the Create/Edit Pleading section.

3. Enable the New Pleading Style option button, and then type a name for the style in the New Pleading Style Name text box.
4. Choose Next to move to the Court Name section.
5. Follow the prompts in the Pleading Expert Designer to complete the pleading style. Notice that as you work, the preview window is updated to show you how your pleading documents will look.

The new pleading styles that you create with the Pleading Expert Designer show up in the Select Court section of the Pleading Expert Filler so that you can select them when you create or edit cases.

NOTE

> The steps to create a pleading style are listed on the left side of the Pleading Expert Designer. If you are only making a few changes, click any step to go directly to it.

USING MACROS TO AUTOMATE REPETITIVE TASKS

Think about your day-to-day activities and ask yourself how much of what you do is repetitive. You may be spending valuable time repeating the same steps over and over, not realizing that you can speed things up considerably with a macro. Hmmmm. What is a macro?

Let me use a popular analogy to try to explain. A camcorder records video and sound on a videotape (or memory card). You can turn the recorder on, record the video, and then turn the recorder off. The video that you recorded is there for you to access when you play the

tape back. The same is true for creating a macro, except instead of recording video, you record actions taken in a document window. You turn on the Macro Recorder, record your actions, and then turn off the Macro Recorder. Whatever you do between turning the Macro Recorder on and turning it back off is recorded in a macro. The next time you need to perform that series of steps, you play the macro and it does the work, at lightning speed. And, it does the same thing, without fail, every single time you run it.

Now, before you skip this section because you think that macros are only for tech-heads, think again. They can be extremely simple, such as typing out your standard letter closing, setting up a landscape page with 10-point Arial, or inserting a page number. Or they can be very complex, such as asking a series of questions and generating a customized document with standard sections of text (such as legal documents, loan forms, and insurance policies).

NOTE

> Previous users of WordPerfect will be pleased to find that the same keystrokes that have been in use since the early DOS WordPerfect days still work in WordPerfect X3. You can still press Alt+F10 to play a macro and Ctrl+F10 to record a macro.

If you're lucky, your firm has distributed a standard set of macros for everyone's use. If this is the case, all you need to know is how to run them, so let's start there. Later on, I'll explain how to create your own macros.

PLAYING MACROS

The trick to playing macros that someone else has provided for you is knowing where they are stored. If you need to look around a bit, you can browse for them. Choose Tools, Macro, Play (or press Alt+F10) to open the Play Macro dialog box (see Figure 21.9). The location of the shipping macros varies depending on your operating system. If you don't see them in the list, look for a PerfectScript folder and go from there. To play a macro, double-click it, or select it and choose Play.

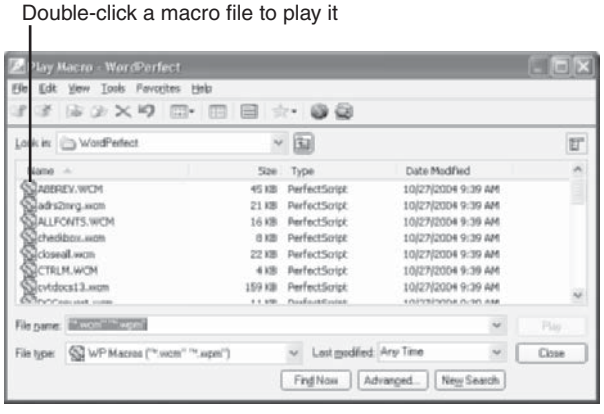
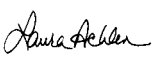


Figure 21.9
The shipping macros are stored in a WordPerfect subfolder of the PerfectScript folder. The exact location varies depending on your operating system.

TIP FROM



The last nine macros that you played are listed at the bottom of the Macro menu. Choose Tools, Macro, and then select one from the list to play it.

CAUTION

If a macro "hangs," you'll have to cancel it manually. Press the Esc key, which will cancel the macro. A message box will appear stating that the macro was canceled by the user. If the Esc key doesn't work, you can right-click the PerfectScript icon (little cassette tape) that sits in the system tray while a macro is running, and choose Stop. Choose Quit when you get the message that the macro is being canceled at the request of PerfectScript. This method can be used to stop a macro mid-flow (even if it isn't "hung").

RUNNING THE SHIPPING MACROS

WordPerfect ships with a collection of macros that are helpful both to use and to examine if you want to become familiar with the PerfectScript macro language. Many of these macros were available in previous versions of WordPerfect, so you're likely to see that your old favorites are still around.

- **Abbrev.wcm**—Opens a QuickWords dialog box, where you can select a QuickWord and expand it in a document. The dialog box stays open so you can expand multiple QuickWords without opening the dialog box each time.
- **adrs2mrg.wcm**—Opens an Address Book to Merge dialog box, where you can choose an Address Book and then create a merge data file from the entire Address Book or just from selected records. This macro creates a text data file with a field name record at the top of the file.

CAUTION

There is an issue with the All Records option in the adrs2mrg.wcm macro in WordPerfect X3. As a workaround, choose Select Records instead. You'll be able to choose your address book and then select records. If you click on a record, and then press Ctrl+A, you'll select all of the records at once. Click the Insert button on the bottom-right corner, and then choose a format to perform the export.

- **Allfonts.wcm**—This macro searches for all the fonts that are installed for the current printer and generates a list of the fonts along with a short sample of text. Depending on the number of fonts you have installed, it might take a few minutes to generate the list. Also, your printer might not have enough memory to print the entire list in a single job. You can get around this limitation by printing only a few pages at a time.

If you don't see all these files in the macro list, see "Where Are the Rest of the Shipping Macros?" in the Troubleshooting section at the end of this chapter.

- **checkbox.wcm**—This macro creates a check box that you can click to insert an x in the box and click again to remove the x. The check box is created as hypertext, so it will show up underlined and blue.

If you don't like blue, underlined check boxes, see "Changing the Hypertext Style" in the Troubleshooting section at the end of this chapter.

- **closeall.wcm**—This macro displays a Close All Documents dialog box, where you can selectively save open documents before they are closed. If documents are unnamed, you can specify a name for the documents in the dialog box. A Save check box lets you decide which documents should be saved before they are closed.
- **ctrlm.wcm**—This macro displays the PerfectScript Command dialog box, where you can select, edit, and insert macro commands in a macro. You don't have to open the Play Macro dialog box to select this macro. Just press Ctrl+M in the document window.
- **cvtdocs13.wcm**—This macro opens the WordPerfect Conversion Expert dialog box, where you can choose to convert a single file, a folder, or a folder and its subfolders to several different WordPerfect formats. You can choose from WordPerfect 13, 12, 11, 10, 9, 8, 7, 6, 5.1, and HTML.
- **DCConvert.wcm**—This macro converts WordPerfect drop cap characters (for example, the first whole word is a drop cap) to a drop cap character that is Microsoft Word compatible (that is, a number of characters drop cap).
- **endfoot.wcm**—This macro converts all the endnotes in a document (or just those in selected text) to footnotes. You must be outside the footnote/endnote area to run this macro.
- **Expndall.wcm**—This macro expands all the QuickWords in the document. You might use this if you work with documents with complex QuickWords. You might decide to turn off Expand QuickWords as you type them and then expand them all at once with this macro.
- **Filestmp.wcm**—This macro opens the File Stamp Options dialog box, where you can choose to insert the filename or the filename and path into a header or footer. If the document has not been named when you run this macro, a filename code is placed in the header or footer. When you save and name the file, the filename (and the path) shows up in the header or footer. If you select Change Font, a Font Properties dialog box appears so that you can select the font (or font size) that you want to use for the file stamp.
- **flipenv.wcm**—This macro displays an Envelope Addresses dialog box, where you can type in the return address (unless you've already selected a personal information entry in the Address Book) and a mailing address. You can also select a mailing address from the Address Book. After you fill in the address information, you can choose an envelope size. The macro creates the envelope, only it flips it 180 degrees so that it is upside-down. This macro was created because some printers have trouble printing text within 1/4 inch of the top-left corner of an envelope, but they don't have a problem printing it within 1/4 inch of the lower-right corner. If you have one of these printers, this macro enables you to print the return address closer.

- **Fontdn.wcm**—This macro reduces the font size by 2 points. If you select text before running the macro, only the selected text is affected. Otherwise, the change takes place at the insertion point and remains in effect until you change the size again.
- **Fontup.wcm**—This macro increases the font size by 2 points. If you select text before running the macro, only the selected text is affected. Otherwise, the change takes place at the insertion point and remains in effect until you change the size again.
- **footend.wcm**—This macro converts the footnotes in the entire document (or just in selected text) to endnotes. You must be outside the footnote/endnote area to run this macro.
- **Longname.wcm**—This macro is for everyone who used descriptive names in document summaries as a workaround for the restrictive DOS file naming conventions. This macro converts the descriptive filenames into long filenames, which can have up to 255 characters. When you run this macro, a Convert to Long Filenames dialog box appears. You can either type the name of the drive and folder where the files are stored, or you can click the Files icon to open the Select Folder dialog box. Select the file(s) that you want to convert in the Select Files to Rename list, and then click OK. When the macro is finished, a record of the changes is created.
- **Parabrk.wcm**—This macro displays a Paragraph Break dialog box, where you can choose a symbol or graphic to display at the next paragraph break. The symbol or graphic is centered on the blank line between paragraphs.
- **pleading.wcm**—This macro displays the Pleading Paper dialog box, where you can choose from a variety of options to generate a legal pleading paper.
- **prompts.wcm**—This macro opens Prompt Builder, which helps you create prompts for your templates. You can create messages that help guide the user along in using the template. You must be editing a template (other than your default template) before you can run this macro.

➔ If the capability to create prompts in your templates sounds appealing to you, **see** "Using Prompt Builder," **p. 489**.

- **reverse.wcm**—This macro displays the Reverse Text Options dialog box, where you can choose a color for the text and a color for the fill (or background). If you've selected text, you can place the reverse text in a text box. If you've selected table cells, the dialog box is a little different. You choose from three table-oriented options: Center Text, Lock Cell, and Header Row.

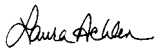
CAUTION

> You can run this macro in a table cell that does not have text in it, but if you start to type the text and the color isn't right, you need to turn on Reveal Codes and make sure your cursor is between the two "color" codes before you type the entry.

- **saveall.wcm**—This macro displays the Save Open Documents dialog box. It works the same way: If you want to save a document, place a check mark next to the filename. If necessary, you can change the filename and path before saving the file.

- **Savetoa.wcm**—This macro saves the current document, and then copies the file to a disk in drive A:. If you haven't named the document yet, you will get the opportunity to do so. When you name the file, don't worry about switching to drive A: or typing a: in the path. All you need to do is name the file—the macro saves it to drive A:.
- **tconvert.wcm**—This macro displays the Convert Template dialog box, where you can type in the name of a template that you want to convert for use in WordPerfect X3. If you can't remember the name (or the location) of the template file, click the Files icon to search for it.
- **uawp13en.wcm**—According to the documentation, this macro is used by the PerfectExpert. You should not delete this file from the macros folder, so don't even think about getting rid of it!
- **wp_org.wcm**—This macro creates a basic organization chart that you can start filling in immediately. You get the same results that you would if you chose Insert, Graphics, Draw Picture to open the Presentations/Draw editing screen and then chose Insert, Organization Chart, and selected the first Single option in the Layout dialog box.
- **wp_pr.wcm**—This macro opens an outline from a WordPerfect document in Presentations as a slide show. You can run the macro whether you have an outline in the document or not, but Presentations has a hard time figuring out what to put on the slides with a regular document. The document is saved as pr_outln.wpd.

TIP FROM



WordPerfect designed a toolbar with buttons for the most frequently used shipping macros. Right-click the toolbar, choose More, and then scroll down and place a check mark next to Shipping Macros.

If you click one of the buttons on the Shipping Macros toolbar and you get an error message that the file can't be found, see "Where Are the Rest of the Shipping Macros?" in the Troubleshooting section at the end of this chapter.

CREATING MACROS

Now that you've played around with a couple of the shipping macros and you've gotten the general idea, you're ready to create a few of your own. Keep in mind that the first several attempts don't have to be perfect; you can keep recording the macro over and over again until you get it right.

For all but the simplest macros, it's a good idea to grab a legal pad so you can jot down the sequence of events. This ensures that you do everything in the right order and don't forget anything.

Follow these steps to record your own macro:

1. You can record a macro in a blank document or in an existing document. In fact, it's most practical to create the macro the next time you need to perform a certain series of steps because you can create the macro and accomplish your task at the same time.

2. Choose Tools, Macro, Record or press Ctrl+F10.
3. Type a name for the macro in the File Name text box. A macro is automatically saved with the .wcm extension, which identifies it as a macro file.
4. If necessary, choose a location for your macro from the Save In drop-down list.

NOTE

By default, new macros are created in the macros folder, which varies according to the operating system on your computer. The locations of the default macro folder and the supplemental macro folder are specified in Settings. Choose Tools, Settings (or press Alt+F12). Click Files and then click the Merge/Macro tab. If you need to change the location, click the Files icon at the end of the text box to browse for the folder. It's a common practice to use the supplemental macro folder as a way to gain access to macros stored on a network.

5. Click Record. The Macro toolbar is displayed underneath the property bar (see Figure 21.10). The recorder is now on, so you're ready to start recording your actions.

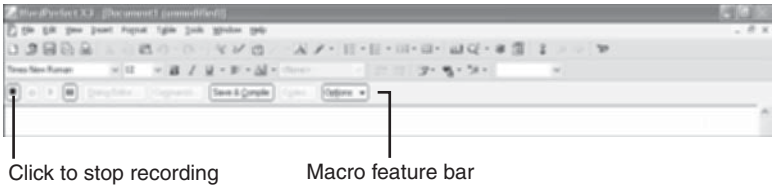


Figure 21.10
The Macro toolbar has buttons to help you record and edit macros.

6. Type the text, work with the features, and do whatever you want to record for future use. The macro records all your actions, whether you use the keyboard or the mouse. There is one caveat—you have to use the keyboard to position the insertion point in the document window.

TIP FROM

You can insert a pause in a macro so a user can type something in. When you are ready for user input, click the Pause While Recording/Executing a Macro button (on the Macro toolbar). At this point, you can either type something and click the button again, or just click the button again to move past the pause. When you run the macro, the macro will pause and wait for input. When you press Enter, the macro resumes.

7. When you're finished, click the Stop Macro Play or Record button (or press Ctrl+F10) to stop recording. The Macro toolbar disappears, and you are returned to a normal document window. The actions that you took while you created the macro have been performed on the document, so you've essentially killed two birds with one stone.

To run the macro, follow the steps detailed previously in the "Playing Macros" section.

If you turn on the Macro Recorder and your fingers rebel against you and you make simple mistakes, see "I Made a Mistake While Recording a Macro" in the Troubleshooting section at the end of this chapter.

If you sometimes get an error message when you run a macro, see "I Get an Intermittent Error Message When I Run My Macro" in the Troubleshooting section at the end of this chapter.

Now that you've created the macro, all sorts of possibilities open up. The first thing you'll probably notice is how tedious it is to play macros by choosing them from a File Open dialog box. Granted, the last nine macros that you played are listed at the bottom of the Macros menu, so you can get to those in a couple of mouse clicks. But what about the others? Changing to different folders and scrolling down through long lists of macros sort of defeats the purpose of running macros, doesn't it?

Thankfully, you have lots of options for putting macros in easy reach. You can assign macros to keystrokes, toolbar buttons, menu commands, and property bars. I'll cover assigning macros later in the chapter, in the "Assigning Macros to Keystrokes, Toolbars, and Menus" section. The next section explains how you assign and create macros in templates so that they are available only in a specific template.

CREATING TEMPLATE MACROS

You can create macros specifically for use with a particular template. Because these macros are saved with a template, they do not appear in the list with the other macros, so they don't clutter up the macros folder. By definition, template macros must be created in a template.

You can do a lot of the same things with template macros that you do with regular macros. You can assign a template macro to a keystroke, toolbar, menu, or property bar. See the section "Assigning Macros to Keystrokes, Toolbars, and Menus," later in this chapter, for the steps to assign a macro.

There are several ways to add a macro to a template:

- You can copy the macro from another template.
- You can copy the macro from a macro file.
- You can record the macro from scratch.

COPYING FROM ANOTHER TEMPLATE

Don't reinvent the wheel! If someone else has developed template macros that you can use, by all means, use them! All you have to do is copy them over from their template and they are all yours.

Follow these steps to copy a macro over from another template:

1. Edit the template that you want to add the macro to.
2. Click the Copy/Remove Object button on the template toolbar to open the Copy/Remove Template Objects dialog box.

➔ If you need a refresher on the steps to edit a project template, **see** "Revising WordPerfect Templates," **p. 481**. [Chapter 18]

➔ For more detailed information on copying objects between templates, **see** "Copying Objects from Other Templates," **p. 486**.

3. Click the Templates to Copy From drop-down list arrow and select the template that has the macros you want to copy.
4. Click the Object Type drop-down list arrow and choose Macros. A list of available macros appears in the Macros list box (see Figure 21.11) .

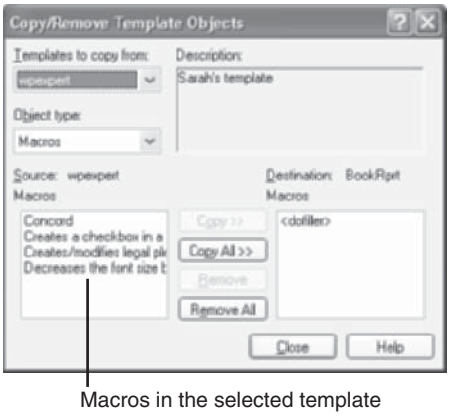


Figure 21.11
A list of macros in the selected template appears in the Macros list box, where you can select them for copying into the current template.

5. Select the macro you want to copy in the Macros list box and click Copy >>. Or, you can click Copy All >> to copy all the macros at once.
6. Click Close, and then save your changes to the template.

TRANSFERRING A MACRO FILE

If someone has already created a macro that you want to include with a template, you can copy it directly from the original macro file. You will use this method when the macro that you want is just a regular macro, not a *template* macro.

Follow these steps to copy a macro from a file:

1. Edit the template to which you want to add the macro.
2. Click the Copy/Remove Object button on the Template toolbar to open the Copy/Remove Template Objects dialog box.
3. Click the Object Type drop-down list arrow and choose Macros on Disk.
4. In the Source text box, either type the path for the macro that you want to copy or click the Browse icon to search for the macro file. When you locate the macro file, select it, and then click Select.

5. The path and name of the macro file are inserted in the Source text box.
6. Click the Copy >> button.
7. Repeat steps 4–6 to copy other macro files to the template.
8. Click Close when you're done.

CREATING A TEMPLATE MACRO FROM SCRATCH

The last method is to create the template macro from scratch. The steps are slightly different from the ones you used earlier in the chapter. First, edit the template to which you want to add macros; then, follow these steps to create a template macro from scratch:

1. Choose Tools, Template Macro, Record. The Record Template Macro dialog box appears (see Figure 21.12).

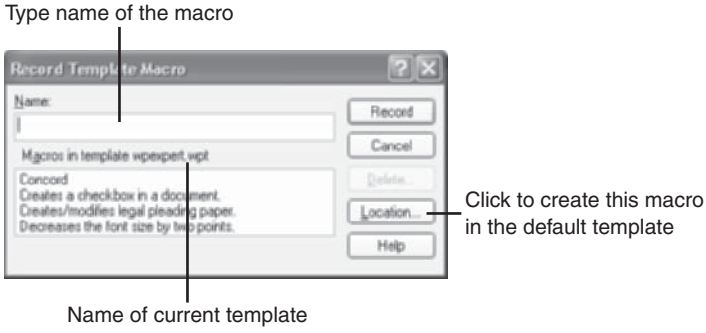


Figure 21.12
You can verify the name of the template, and then type the name of the macro in the Record Template Macro dialog box.

2. Type a name for the macro in the Name text box and then click Record.

If nothing happens after you enter the macro name and click Record, see "I'm Stuck in the Record Template Macro Dialog Box" in the Troubleshooting section at the end of this chapter.

3. Get busy recording whatever it is that you want to do in this macro.
4. Click the Stop Macro Play or Record button (or choose Tools, Template Macro, Record) to stop recording. The Macro toolbar disappears, and you are returned to a normal document window.

NOTE

For a macro to be associated with a trigger, it must have been created as a template macro. For example, you could set up a "preprint" trigger to run a macro that accepts client identification information so the printer resources can be billed back to the client.

➔ To get the scoop on macro triggers, **see** "Associating Macros to Triggers," **p. 496**.

CREATING QUICKMACROS

Ever have one of those days when you are forced into typing a long and complex phrase over and over again? And you don't want to create a macro because it's not likely that you'll have to type that same information again? Wouldn't it be nice if you could create a temporary macro just for that day? You can—it's called a QuickMacro.

QuickMacros are created as template macros —the only difference is that you don't name a QuickMacro. The QuickMacro is assigned to a temporary file for this session, and when you exit WordPerfect, the file is erased. You can have only one QuickMacro at a time. To replace a QuickMacro, simply create a new one. Follow these steps to create a QuickMacro:

1. Choose Tools, Template Macro, Record to display the Record Template Macro dialog box (refer back to Figure 21.12).
2. Don't type a name—just press Enter or click the Record Button.
3. When you see the Macro toolbar, you can start recording the macro.
4. Click the Stop Macro Play or Record button (or choose Tools, Template Macro, Record) to stop recording. The Macro toolbar disappears, and you are returned to a normal document window.

The QuickMacro won't appear in the template macro list, but don't be fooled. It's in there. When you're ready to play the QuickMacro, choose Tools, Template Macro, Play. Press Enter, or just click Play.

ASSIGNING MACROS TO KEYSTROKES, TOOLBARS, AND MENUS

There are a variety of different ways to put the macros you use the most right at your fingertips. You can assign a macro or a template macro to a keystroke (such as Alt+8), to a toolbar button, or to a menu. Macros (but not template macros) can also be assigned to the property bar. Let's start with the steps to assign a macro to a keystroke first, and then move on to the others.

ASSIGNING MACROS TO KEYSTROKES

Because you spend most of your time with your hands on the keyboard, macros that are activated by a keystroke are immensely popular. The only problem is that many other features are already assigned to shortcut keys. You can either choose one that isn't currently assigned or you can replace the current assignment.

➔ For the steps to edit a project template, **see** "Basing a Template on Another Template," **p. 484**.

The steps to assign a macro or a template macro to a keystroke are similar, so rather than repeat steps, I'll point out the differences as we go along. In every case, when you want to assign a template macro, you need to edit the template that contains the macro first. Then follow these steps to assign a macro to a keystroke:

1. Choose Tools, Settings (or press Alt+F12), and then click Customize. This opens the Customize Settings dialog box.
2. Click the Keyboards tab to display the available keyboards (see Figure 21.13).

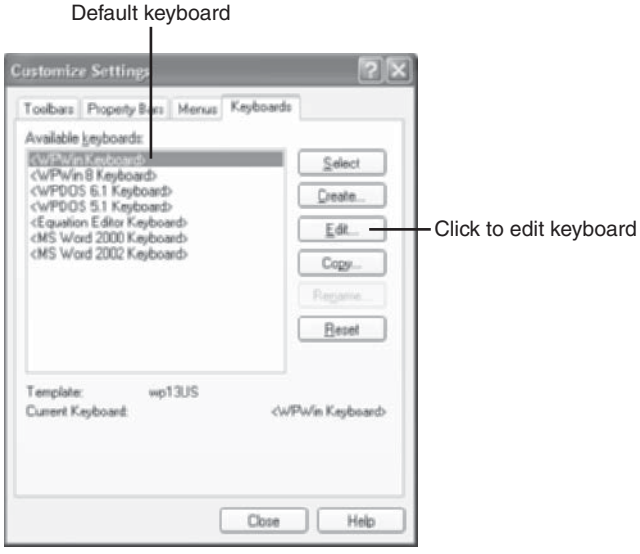


Figure 21.13
You can select the keyboard that you want to edit in the Keyboards tab of the Customize Settings dialog box.

3. If you want to edit the default keyboard, leave `<WPWin Keyboard>` selected. Otherwise, select another keyboard.
4. Choose Edit to display the Keyboard Shortcuts dialog box. This is where you choose the keystroke and select a macro.
5. Select the shortcut key that you want to use from the Choose a Shortcut Key list box.
6. Click the Macros tab to display the macro options (see Figure 21.14).

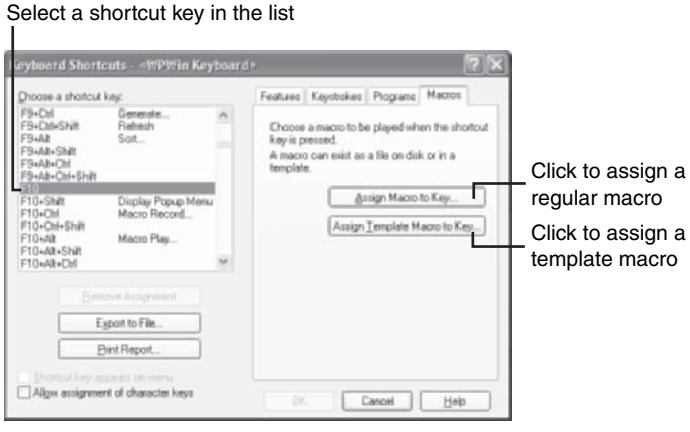


Figure 21.14
You can assign a macro to any keystroke that you see in the list, even if the keystroke already has something assigned to it.

7. Click Assign Macro to Key to assign a regular macro to a keystroke; click Assign Template Macro to Key to assign a template macro to a keystroke.
8. Depending on which button you clicked in step 7, you see the Select Macro dialog box or the Select Template Macro dialog box. Either way, select the macro that you want to assign and then choose Select.
9. If you're assigning a template macro, skip this step. In the message box, choose Yes if you want the entire path to show up in the shortcut keys list; choose No if you want only the name of the macro displayed in the list.

CAUTION

If the macro is not stored in the default macro folder or the supplemental macro folder specified in File Settings, make sure that you save the macro with the full path.

10. Repeat steps 5–9 to assign other macros to shortcut keys.

TIP FROM

If you skipped WordPerfect 10/11/12, you haven't seen a cool new feature: printing lists of keyboard shortcuts. Choose Tools, Settings, Customize. Click the Keyboards tab. Select the keyboard that you want to print from, and then choose Edit. Choose Print Report to print a list of shortcut keys, or choose Export to File to save the list as a comma-delimited file.

ASSIGNING MACROS TO TOOLBARS

Now that you understand the general concept, assigning macros to toolbar buttons is a snap. Again, the steps to assigning a regular macro and a template macro are similar, so I'll point out the differences as we go along. Remember that if you want to assign a template macro to a toolbar button, edit the template first. Then, follow these steps to assign a macro to a toolbar button:

1. Choose Tools, Settings (or press Alt+F12), and then click Customize. If necessary, click the Toolbars tab. A list of available toolbars is displayed in the Customize Settings dialog box (see Figure 21.15).

➔ For the steps to edit a project template, **see** "Basing a Template on Another Template," **p. 484**.

2. Select a toolbar, and then choose Edit to open the Toolbar Editor dialog box. This is where you choose a macro to assign to a toolbar button.
3. Click the Macros tab to display the buttons to add a regular macro or a template macro (see Figure 21.16).
4. Click Add Macro to add a macro to a toolbar button, or click Add Template Macro to add a template macro to a toolbar button.

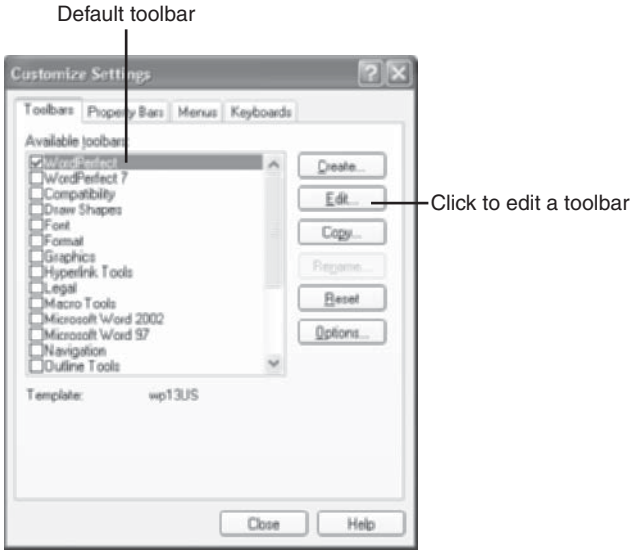


Figure 21.15
You can select the toolbar that you want to edit in the Toolbars tab of the Customize Settings dialog box.

Figure 21.16
You can add a macro or a template macro to a toolbar button in the Macros tab of the Toolbar Editor dialog box.

5. Depending on your choice, you see the Select Macro dialog box or the Select Template Macro dialog box. In either case, select the macro, and then choose Select. If you've assigned a macro, you are prompted to save the macro with a full pathname (Yes or No).

CAUTION

> If the macro is not stored in the default macro folder or the supplemental macro folder specified in File Settings, make sure that you save the macro with the full path.

6. Repeat steps 3–5 to assign other macros to toolbar buttons.
7. Click OK when you're finished making your changes.

CAUTION

When you are finished with your toolbar editing, make sure you don't click the X button in the upper-right corner of the toolbar editor. If you do, you'll lose all of your changes. Choose OK instead.

NOTE

The steps to add a macro to a property bar are very similar to the steps to add a macro to a toolbar. The only difference is that you click the Property Bars tab, and then select the property bar that you want to edit. The Text property bar is the default, or the one that you see in a blank document. From here, you can repeat the preceding steps, starting at step 3.

A new button has been added to the selected toolbar. All macros have the same button picture of a cassette tape (see Figure 21.17). Click and drag the new button to position it on the toolbar.

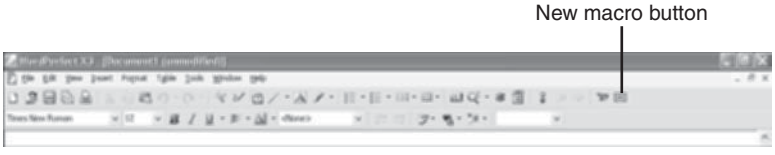


Figure 21.17
Macro buttons all use the same picture, that of a cassette tape. Pause over a macro button to display a QuickTip.

Because the buttons are all the same, you need help differentiating the macro buttons. While you're editing a toolbar, you can modify the properties for a macro button. Double-click the button to display the Customize Button dialog box (see Figure 21.18), where you can type text to appear on the button and the message for the QuickTip. Button text doesn't appear by default, so the second part of the process is to change the button option settings to show text in a button. On the Toolbars tab of the Customize Settings dialog box (refer to Figure 21.16), choose Options to open the Toolbar Options dialog box. Choose Text to display only the text, or Picture and Text to display both the picture and the text message.

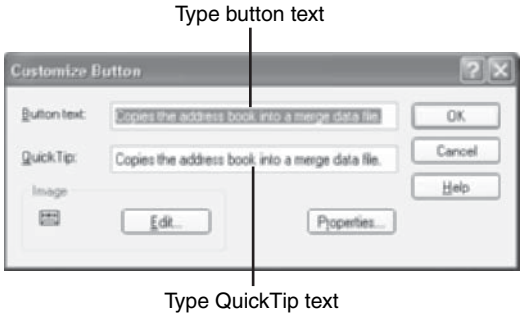


Figure 21.18
You can type button text and the message text that you want to assign to a macro button in the Customize Button dialog box.

TIP FROM

If you would rather save space and not use text, you can change the graphic on the button. There is an option that enables you to edit the button, but it doesn't really produce good results because you are editing the actual pixels of the image. A better solution is to copy a graphic from another button. First, find a button whose graphic you like—scroll through the list of available features, trying various categories if necessary, watching the button graphic area below the feature list. When you find a button you like, click the Add button to add it to the toolbar, and then double-click it. Click the Edit button in the Image area, click Copy, click OK or Cancel, again OK or Cancel, double-click your macro button, click Edit, and then Paste, and then OK twice. (Then you can drag off the toolbar the button you had added just to be able to copy its picture.) This sounds complicated, but it's not. Give it a try just once and see if this will work for you.

ASSIGNING MACROS TO MENUS

If you aren't concerned about the clutter, you can put your macros right on the menu bar. The name of the macro (or whatever else you want to appear) shows up on the menu bar right next to the other menu items. To play the macro, you just click the name on the menu bar.

As usual, if you want to assign a template macro, you need to edit the template first. Then, follow these steps to assign macros to the menu bar:

1. Choose Tools, Settings, and then click Customize.
2. Click the Menus tab to display a list of available menus (see Figure 21.19).
3. Select a menu, and then choose Edit to open the Menu Editor dialog box. This dialog box is almost identical to the Toolbar Editor dialog box shown in Figure 21.19.
4. Click the Macros tab.
5. Click Add Macro to assign a macro, or click Add Template Macro to assign a template macro. Depending on your choice, you see the Select Macro dialog box or the Select Template Macro dialog box.
6. In either dialog box, select the macro, and then click Select.

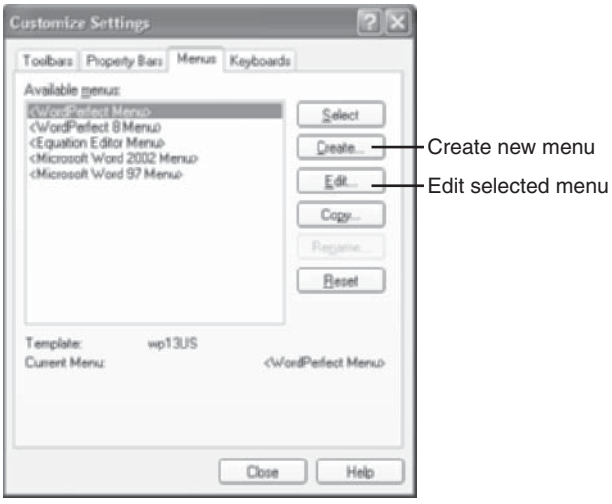


Figure 21.19
You can create customized menus or edit the existing menus in the Menus tab of the Customize Settings dialog box.

7. Choose Yes if you want to save the macro with the entire path, or choose No if you don't want to. The name (or the description if you added one on the document summary) or the entire path for the macro is added to the menu bar (see Figure 21.20).

Figure 21.20
After you've added a macro to the menu bar, you can give it a friendlier name.

CAUTION

> If the macro is not stored in the default macro folder or the supplemental macro folder specified in File Settings, make sure that you save the macro with the full path.

8. Repeat steps 5–7 to assign other macros to shortcut keys.

If you save the macro with the path (so that you don't have to put it in the default macro folder), you'll see that the macro path takes up a lot of space on the menu bar. You can give the macro a friendlier name and a description that appears in the QuickTip. With the Menu Editor dialog box displayed, double-click the macro name, description, or path on the menu bar to open the Edit Menu Text dialog box, which looks similar to the Customize Button dialog box shown in Figure 21.18. Type a friendlier name for the macro in the Menu Item text box and then type a description in the QuickTip text box.

To take this idea one step further, consider creating a Macros menu with your frequently used macro names on that menu. In the menu editor, drag the Menu button up and drop it on the toolbar, and then double-click it and type a name in the Menu Item box. If you want an underlined letter (like the other menus have), type an ampersand (**&**) just prior to the letter that is to be underlined—just make sure you don't pick a letter that is being used by one of the other menus. The letter "M" is available, so type **&Macros** to name the new menu "Macros" with an underlined M. Then, as you add macros to the toolbar, drag them down into the new Macros menu. You can add submenus within the menu and separators between groups of macros or submenus, and you can edit the macro name labels also to include an ampersand before a (carefully selected) letter if you want the macros to be accessible via the keyboard. Just make sure that none of the macros or submenus under the Macros menu have the same letter underlined. (Each submenu keeps its own list of underlined letter triggers, so if you have lots of macros to add, using submenus can help both make the list manageable and keep letters available.)

EDITING MACROS

Let's say that someone in your company is in charge of developing and distributing macros for everyone else's use. If so, count yourself lucky and make sure you say "thank you" once in a while because if you ever want some changes made, that is the person you'll have to go to.

However, if all you want to do is change a name, address, or other minor detail, you can save yourself some groveling by making the minor changes yourself. Furthermore, you might have an occasion to edit the macros that you created.

When you open a macro, you'll see that rather than record your exact keystrokes (as earlier versions of the macro language did), the Macro Recorder actually records the results of your actions. For example, if you use the menus to change the margins, you can't see the actual menu commands that you selected. Instead, you see the margin change itself.

You can edit macros and template macros with essentially the same steps. However, if you want to edit a template macro, you have to edit the template first. Then, follow these steps to edit a macro:

1. Choose Tools, Macro (or Template Macro), Edit. Depending on which type of macro you chose, you'll see the Edit Macro dialog box or the Edit Template Macro dialog box.
2. In either case, select the macro you want to edit, and then choose Edit. The macro appears in the document window (see Figure 21.21).

Figure 21.21
This macro sets up a letterhead page, a new margin setting, a font change, today's date, a salutation, and a closing.

CAUTION

> Here's where things get a little tricky—you must use extreme care so that you don't accidentally delete (or modify) the macro commands. If you do, make sure you don't save your changes when you close the macro. Take a deep breath and start over.

3. Make the necessary corrections to the text portions of the macro. Unless you're comfortable with macro commands, it's a very good idea to leave them alone.
4. Click the Save and Compile button to save the macro before you close it. If there are any problems, you'll see an error message so you'll know right away if you need to fix something.
5. When you're finished, click the Close button on the menu bar to close the document window.

LEARNING MORE ABOUT PERFECTSCRIPT

If you're editing a macro that someone else has written, it's likely to be more complicated than the macro shown in Figure 21.21. You'll see lots of programming commands and you might be wondering where they come from.

WordPerfect's macro language is called *PerfectScript*. It is a command-based language that can be used to write macros in WordPerfect, Presentations, and Quattro Pro. You can do a lot more with PerfectScript than just play back recorded commands. Macros can stop and prompt for input, and then, based on that input, go to a different section of the macro and execute the commands there. Macros can be structured to display messages and customized dialog boxes. Information from other WordPerfect Office applications can be combined. In fact, you can actually build complete document-building applications (or wizards) for those users with limited WordPerfect experience.

Downloading the SDK for WordPerfect Office X3

The Software Developer's Kit (SDK) is a set of tools that lets you customize WordPerfect Office applications for commercial or business use. The SDK contains reference materials, OLE automation samples, and PerfectScript tools, as well as code generation wizards, tools, and utilities for third-party add-ons to WordPerfect. One of the utilities, `wplook.exe`, is used to repair corrupt files.

The SDK (available in the Professional edition of WordPerfect Office X3) can be downloaded from Corel's site. You'll need to first register as a partner at `www.corel.com/partners`. The base level is free so don't let the registration scare you off. You'll get access to the SDK, but also other resources that are available on CorelConnected. Registration gives you immediate access to low-cost license purchases.

Unfortunately, covering the PerfectScript macro language is beyond the scope of this book. Here are some places where you can go for help:

- Consult the help topics. Specifically, read the information under the heading "Recordings, Macros, and Automation Features" in the Contents tab of the Help Topics dialog box. Also, use the Index to browse through the list of topics under "macros."
- If you're inserting commands in the PerfectScript Commands dialog box, you can select a command in the list to view a brief description. (Remember the keyboard shortcut to open that dialog box is Ctrl+M.)
- You can view the User Guide for more information on Macros & PerfectScript. For WordPerfect X3, choose Start, (All) Programs, WordPerfect Office X3, Support, User Guide (*.PDF).

CAUTION

You must have the Adobe Acrobat Reader installed to view the Reference Center materials, so if you don't already have it installed, you'll be prompted to install it. Insert the WordPerfect Office CD and run the Install Wizard to install Adobe Reader. You can also go to `www.adobe.com` and download the latest version of Adobe Reader.

- Buy a book that specifically covers macro programming with PerfectScript. Ask your local bookstore to do a search for you, or visit one of the online bookstores and search for WordPerfect macros.
- Run through the excellent macro tutorial by Seth Katz. The tutorial assumes no previous macro experience and covers a lot of ground. Go to `http://www.shkatz.com/macrotut/index.html`.

USING MACROS FROM PREVIOUS VERSIONS OF WORDPERFECT

The basic structure of the programming language hasn't changed since WordPerfect 6. New commands have been added to take advantage of new features and to use existing features more efficiently. The majority of the old commands have been retained to ensure backward compatibility.

A new warning system has been put into place that will warn you if a command is obsolete and might potentially be removed in future versions. This system works for macros developed with WordPerfect version 5 and beyond. The messages are only warnings—you can still use the command and you can ignore the warning. The macro will work just fine after it has been saved and compiled. You won't have to go through the warning messages again, unless you edit and recompile the macro. Compiling a macro is a dry run where the macro is checked for accuracy but isn't actually executed.

To convert macros from previous versions of WordPerfect, you have to open the macro and save it, which forces the macro to be compiled in WordPerfect. Follow these steps to convert macros:

1. Choose Tools, Macro (or Template Macro), Edit. Depending on which type of macro you choose, you'll see the Edit Macro dialog box or the Edit Template Macro dialog box.
2. In either case, select the macro you want to edit, and then choose Edit.
3. If you need to make some changes, do that now.
4. Click the Save & Compile button on the Macro toolbar.
5. Correct any errors listed by the macro compiler, and then click the Save & Compile button again. When you don't get any more errors, close the macro and save your changes.

If you are getting a bunch of warning messages when you run some of your macros, see "Warning Messages When Running Macros" in the Troubleshooting section at the end of this chapter.

VISUAL BASIC—DO YOU NEED IT?

WordPerfect Office includes support for Microsoft Visual Basic for Applications (VBA) programming language, which can be used as an alternative to the PerfectScript programming language. WordPerfect gets a gold star for being the only mainstream word processor to offer two powerful programming languages that can be used separately or in combination.

So, do you need it? It depends on whether you need to accomplish something that you can't do with PerfectScript. VBA is harder to learn and requires a much higher level of understanding of how WordPerfect operates. Prior experience with an object-oriented programming language is a definite plus.

NOTE

> VBA support isn't installed by default, so if you want to use it, you have to install it from the CD. Make sure you disable your antivirus program before you install any part of WordPerfect Office X3.

Unless you've been living under a rock, you've heard about all the macro viruses and the havoc they have wreaked on companies such as Microsoft, Intel, and Dell. These viruses are easy to spread because of the way Microsoft Word handles macros in a document. You might have heard that by installing VBA support with WordPerfect, you are leaving yourself open to macro viruses. Well, you're right to be concerned. If you've installed VBA support and you open a document that contains VBA macros (also called projects), the VBA macros are automatically triggered.

Thankfully, WordPerfect is designed in such a way that the risk is minimal and easy to avoid with a good antivirus program. There are also extra security measures built in to the version of VBA that ships with WordPerfect. Just make sure that you impress upon anyone who will listen that they should never, ever, ever, disable their macro virus security just because it's a pain to bypass the warning messages every time they open a file with VBA macros embedded in it.

TIP FROM

> For more information on what VBA means to you, check out Gordon McComb's frequently asked questions (FAQ) document on VBA. Go to `www.gmccomb.com/vbafaq.html`. This piece was written when WordPerfect 9 was released, but the majority of it applies to WordPerfect X3. Also, read over the VBA section of the Release Notes document (`readme.txt` or `readme.html`), which is located on the WordPerfect Office X3 CD.

After all the media hype surrounding viruses and how they bring down the e-mail systems of many companies, you would think that the employees would know better than to disable their virus protection. I guess it just goes to show that no one is immune to computer viruses. Consider every file suspect until you've checked it out with an antivirus program that has the latest virus definitions installed, even if your best friend just gave it to you.

WordPerfect Office X3 supports Digital Signatures in WordPerfect, Quattro Pro, and Presentations. You can use these signatures to sign and authenticate documents and macros. For Digital Signatures to function properly, you must have Microsoft Internet Explorer (IE) 5.5 or higher installed on your system. If you do not, the Setup program will install the browser components of Internet Explorer 6

NOTE

> WordPerfect Office X3 includes support for Entrust version 4.0 and later. Entrust is an upgrade component for WordPerfect that lets you encrypt and digitally sign documents in WordPerfect using the Entrust security system. You must have access to an Entrust server to use the WordPerfect Entrust integration.

Troubleshooting

Where Are the Rest of the Shipping Macros?

I want to play the `allfonts` *macro, but it doesn't appear in the list of macros. Where are the rest of the files?*

Some of the macro files might have been accidentally deleted, or you might be looking in the wrong folder. First, look in Settings to see where macros are stored in your system. Choose Tools, Settings, Files and then click the Merge/Macros tab. Jot down the location of the default macro folder. Now, choose Tools, Macro, Play and verify that you are looking in the same folder that was noted in Settings. If not, browse to that folder and look for the macros. If you still don't see them, do a repair install, which will copy the macro files onto your system. Choose Start, Control Panel, Add/Remove Programs; then select WordPerfect Office X3, and then choose Change. In the Program Maintenance window, choose Repair, and then click on Next. Click Next again, and then Install.

I Made a Mistake While Recording a Macro

In the middle of recording a macro, I realized that I'd made a mistake. What should I do?

Relax, it isn't the end of the world—the mistake is easily fixed. In fact, you might be surprised to learn that WordPerfect doesn't even record some of your mistakes in the macro.

You can stop recording the macro at this point and just start over, saving the new macro over the incomplete macro. Or, you can fix the mistake and go on. In most cases, the "fix" isn't recorded—only the final result of your actions.

I Get an Intermittent Error Message When I Run My Macro

I created a macro that changes the font and font size for selected text. When I run the macro, sometimes I get an error that says the macro is being canceled due to an error on line 3. Other times, the macro runs just fine. I've reviewed the macro and I can't find anything wrong. What now?

Did you select text before you ran the macro? If not, the macro won't work. You've just run into a problem with states. If you record a macro that takes action on selected text, that macro expects a state of selected text when you run it. If it doesn't find that state, the macro can't run properly.

The same holds true for other conditions in WordPerfect. For example, if you write a macro that customizes graphics boxes, you need to make sure there is a graphics box in the document before you run the macro.

I'm Stuck in the Record Template Macro Dialog Box

I'm trying to create a template macro from scratch. When I enter a name for the macro and click Record, nothing happens. I have to cancel out of the dialog box.

It sounds like the template file is damaged. If you're adding the template macro to the default template, you'll have to rename the default template and let WordPerfect create a

new one when you start WordPerfect again. Unfortunately, this means you'll lose any customizations that have been made to the toolbars, keyboards, menus, styles, macros, and other objects that are stored in the default template.

Let me stop here and remind you how important it is to make a backup copy of your default template after you've done some customizing. It takes only a second, and it can save you hours. In fact, you might be able to recover by simply deleting the corrupted default template and renaming the backup copy. The name of the default template is `wp13us.wpt` and you'll find it in the folder specified in Settings as the default template folder (choose Tools, Settings, Files, Template). The "us" stands for the U.S. English version of the program. Those two letters will vary depending on the language and country version of WordPerfect that you use.

If you are adding a template macro to one of the project templates, try getting a fresh copy of the template from the WordPerfect Office X3 CD. Insert the CD and when the Install Wizard starts, choose a Repair install.

WARNING MESSAGES WHEN RUNNING MACROS

I've just started using some of the macros that I wrote in previous versions of WordPerfect. When I run them for the first time, I get warning messages about obsolete commands. What's this all about?

The first time you play a non-WPX3 macro, the macro system recompiles the macro to make sure that the macro is using commands that still work in version X3. If the macro is using commands that have become obsolete over releases of WordPerfect since version 5, you will get a warning message about the command. These commands will still work, though, and you can ignore the warnings—for now, at least. You should keep in mind that these commands can be removed in future versions of WordPerfect.

CHANGING THE HYPERTEXT STYLE

I just created a check box in my document, and that blue underline stands out like a sore thumb. Is there any way to change the appearance of the check box?

Check boxes are created as hypertext, which by default appears underlined and in blue. Thankfully, you can modify the style used for hypertext. Keep in mind that if you alter the style, it will affect other hypertext codes in the document, so you might want the other hypertext codes to appear as buttons instead.

To modify the hypertext style, choose Format, Styles. In the Styles dialog box, choose Options, Settings. If necessary, place a check mark in the WordPerfect System Styles check box. Select WordPerfect heading styles and all other system styles, and then click OK. In the Available Styles list box, select Hypertext and then click Edit. In the Styles Editor dialog box, make sure there is a check mark in the Reveal Codes check box. In the Reveal Codes window, delete the [Color: Blue] code, the [Und] code, and the [Color: Black] code. Click OK and then click Close. The check box should now appear black and not be underlined.

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CHAPTER 22

Getting Started with Quattro Pro

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GETTING COMFORTABLE WITH QUATTRO PRO

Although WordPerfect tables are capable of performing spreadsheet-like calculations, at some point, you will need to reach for an application that is specifically designed to manipulate financial data. Quattro Pro is a full-featured spreadsheet program. It is included, along with WordPerfect X3, in the Productivity Packs being bundled with major name computers. If you've purchased the Student and Teacher Edition, the Small Business Edition, an upgrade to, or the full version of Corel WordPerfect Office X3, you will also have Quattro Pro on your CD.

Quattro Pro compares favorably to Microsoft Excel and is widely reported to be easier to use and more intuitive than Excel. It can be used to manage household budgets, small office accounts, or project expenses.

This chapter assumes no previous experience with a spreadsheet, so it starts at the very beginning. It covers the basics of creating, saving, and printing spreadsheets. If you've already used another spreadsheet program, you might just want to glance at Figure 22.1 to get familiar with the Quattro Pro screen, and then skip ahead to the section that interests you.

STARTING QUATTRO PRO

The quickest way to start Quattro Pro is with a shortcut on the desktop. Double-click the shortcut and away you go! If you don't have a shortcut, using the Start menu is easy—it just takes a few more clicks.

To start Quattro Pro from the Start menu

1. Click Start.
2. Select Programs (or All Programs), WordPerfect Office X3 (or WordPerfect Productivity Pack).
3. Click Quattro Pro.

At this point, you may see a dialog box that asks you which mode you want to start in (see Figure 22.1). This is the Workspace Manager, a new feature that helps you switch back and forth between three different Quattro Pro interfaces: Quattro Pro, Microsoft Excel, and Lotus 1-2-3. Leave the selection set to Quattro Pro; then choose OK to clear the dialog box.

TIP FROM

To create a shortcut to Quattro Pro, first close or minimize all open programs. Next, click Start, Programs (or All Programs), WordPerfect Office X3, and slide the mouse pointer over to Quattro Pro—but don't click it. Instead, right-click Quattro Pro; then choose Send To, Desktop (create shortcut). Now when you close the Start menu, you will see a shortcut to Quattro Pro on your desktop. Just double-click the shortcut (or right-click and then click Open) to launch the program.

Figure 22.1
The Quattro Pro Workspace Manager lets you choose among Quattro Pro, Excel, and Lotus 1-2-3 workspaces.

If you can't find the WordPerfect X folder on your Start menu, see "Having Trouble Starting WordPerfect" in the Troubleshooting section at the end of this chapter.

TOURING THE QUATTRO PRO SCREEN

All Windows applications look essentially the same. They all have title bars, menus, toolbars, and control buttons. This gives you a distinct advantage because using one Windows application prepares you to learn another.

When you start Quattro Pro, a blank spreadsheet appears (see Figure 22.2) so you can start working right away. With Quattro Pro, you create *notebooks*, which may consist of a single spreadsheet, or they may contain a complete project with multiple spreadsheets, charts, and reports. A single notebook can contain up to 18,278 spreadsheets and each spreadsheet can contain up to 1,000,000 rows and 18,278 columns. In a side-by-side comparison, you'll see that the maximum size of a Microsoft Excel spreadsheet is 65,536 rows by 256 columns.

In Quattro Pro, a single spreadsheet is called a "sheet." A notebook can contain up to 256 sheets. There are sheet tabs across the bottom of the notebook window to navigate between sheets. See the section titled "Naming a Sheet" later in this chapter for more information on naming sheets.

Let's focus on the areas of the screen that are similar to WordPerfect and then move on to what is different. These elements are common, although they might have a different function in Quattro Pro:

- **Menu bar**—For access to features.
- **Toolbar**—Contains buttons for frequently used features.
- **Property bar**—Has buttons and drop-down lists for frequently used features. This bar changes depending on what you are working on.
- **Application bar**— Displays the open notebooks and status indicators.
- **Scrollbar**—Works exactly the same as the scrollbar in WordPerfect. Notice the Browse By button on the scrollbar.

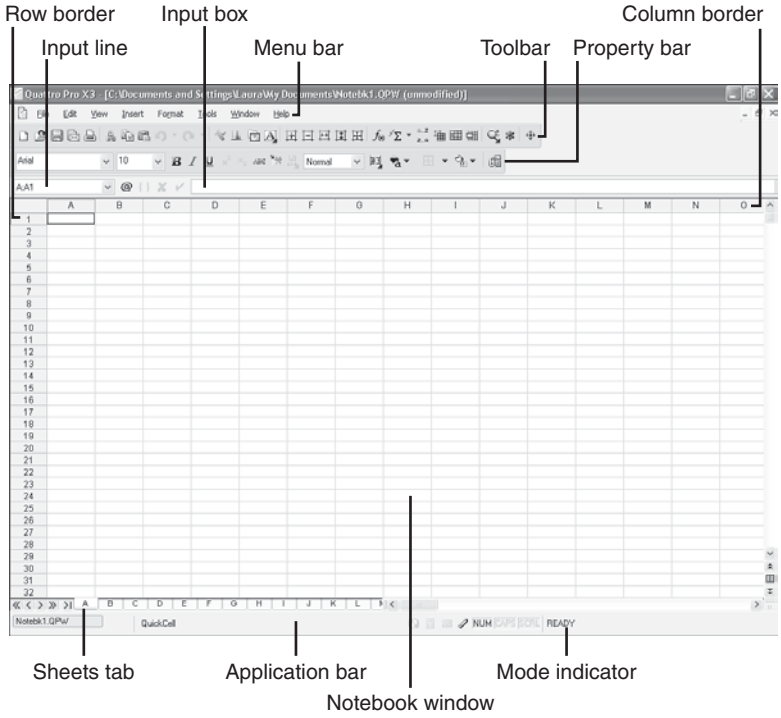


Figure 22.2
The Quattro Pro screen has many of the same elements as the WordPerfect screen.

Now, get ready for the new stuff. These elements might be new to you:

- **Notebook window**—Has all the same controls as a WordPerfect document window, but it's laid out in a grid. The columns are labeled with letters; the rows are numbered.
- **Row border**—Identifies the row number. Clicking a row number selects the entire row.
- **Column border**—Identifies the column letter. Click a column letter to select an entire column.
- **Input line**—Shows the current cell's address and contents.
- **Sheet tabs**—A Quattro Pro notebook can contain multiple "sheets." You can put different parts of a spreadsheet on different sheets, rather than having one huge spreadsheet. Click one of the sheet tabs to switch to a different sheet.
- **Mode indicator**—Pay attention to the mode indicator that shows READY for input, VALUE if the entry is a number, and TEXT if the entry is text.

ENTERING THE INFORMATION

To start creating a spreadsheet, you enter data into the individual cells. The currently selected cell is the active cell, which means you can enter or edit the data in it. As you click in the notebook window, the active cell border moves to the cell where the pointer is positioned.

A cell address is a combination of the sheet name, row number, and column letter. For example, the cell in the top-left corner of sheet A is in column A, on row 1, so the cell address would be A:A1. The input line (see Figure 22.2) displays the cell address for the currently selected cell(s).

ENTERING VALUES AND LABELS

Entering the information into a spreadsheet is most of the work. After you've typed in the titles and figures, you can move, copy, format, and perform calculations to your heart's content.

The two types of data in Quattro Pro are as follows:

- **Label**—An entry that you won't be using for calculations. For example, February, MP3, and "6-1-06" are all labels. A label can begin with any letter or punctuation mark *except* the following: `+`, `-`, `/`, `$`, `(`, `@`, `#`, `.`, `%`, or `=`. If you type one of those symbols, Quattro Pro treats the information as a formula or a value.
- **Value**—A numeric entry or calculated result. Numbers can begin with leading plus or minus signs; an equal sign, currency symbols, numerals, commas, or periods; or a trailing percent sign. As you enter the values, don't include currency symbols, decimal points, commas, or spaces. You will set that up later with cell formatting.

To enter labels

1. Click in the cell where you want the label to appear.
2. Type the label.

If you are typing a label that begins with a number, type a quotation mark and then the number. The quotation mark tells Quattro Pro that the information is a label, not a value.

NOTE

> In fact, there are three symbols that you can type to make Quattro Pro treat a number as a label: the double quotation, the single quotation, and the caret. The double quotation mark aligns the data on the right edge of the cell; the single quotation mark aligns the information on the left edge of a cell; the caret symbol centers the information in the cell.

If a label is longer than the column width, Quattro Pro will display it across empty cells to the right. However, if the cells to the right are not empty, the text in the column will be "cut off." Don't worry, it's still being stored in the cell; it's just not visible. When you increase the width of the column, the rest of the label will appear.

➔ For more information on adjusting column widths, **see** "Adjusting Column Width and Row Height," **p. 639**.

To enter values

1. Click in the cell where you want the value to appear.
2. Type the value. To enter a negative number, type a minus sign (-), and then the number.

If Quattro Pro displays asterisks instead of the number entered in the cell, see "Asterisks Instead of Numbers" in the Troubleshooting section at the end of this chapter.

NOTE

Don't worry about typing in currency signs, percent signs, commas, or decimal places at this point. You can add that formatting to the values all at once. Since you can adjust the formatting options when necessary, you'll not only save time, you'll gain flexibility.

NAVIGATING AROUND THE NOTEBOOK WINDOW

The fastest way to move around in a notebook is to use the mouse to click in a cell. You can also use some other keyboard shortcuts to move around:

- **Home**—Move to cell A1.
- **Tab/Shift+Tab**—Move one cell to the right; move one cell to the left.
- **Arrow keys**—Move up, down, left, or right one cell.
- **PgUp/PgDn**—Move one screen up; move one screen down.
- **Ctrl+Left/Right Arrow**—Move one screen to the left; move one screen to the right.
- **GoTo (F5)**—Move to a specified cell.
- **End, Home**—Moves to the "last" cell in the current sheet. That is, the lowest row in which there is text somewhere in that row, and the rightmost column in which there is text somewhere in that column. Incidentally, you need to press End, then Home, not both keys at the same time.
- **Ctrl+Home**—Moves to sheet A, cell A1. In contrast, pressing Home goes to cell A1 of the current sheet.
- **Ctrl+End, Ctrl+Home**—Moves to the last cell in the last sheet, which is the last sheet that has text in it, and the cell at the meeting point of the last row that has text and the rightmost column that has text in it.

EDITING CELL ENTRIES

It's a rare day if you can create an entire spreadsheet without needing to go back and make changes to it. Whether you have typed in an incorrect value or you need to rearrange some columns, you can make these changes using the same techniques that you learned for editing text in WordPerfect.

Data in a cell can be edited as easily as you would edit text in WordPerfect. You get several different options for editing the contents of a cell:

- Click in the cell and retype the entire entry.
- Double-click in the cell and edit the entry.
- Click in the cell, and then click in the Input box to edit the entry in the Input box (see Figure 22.3).

When you are finished, press **Enter**, **Tab**, or one of the arrow keys to apply the change.

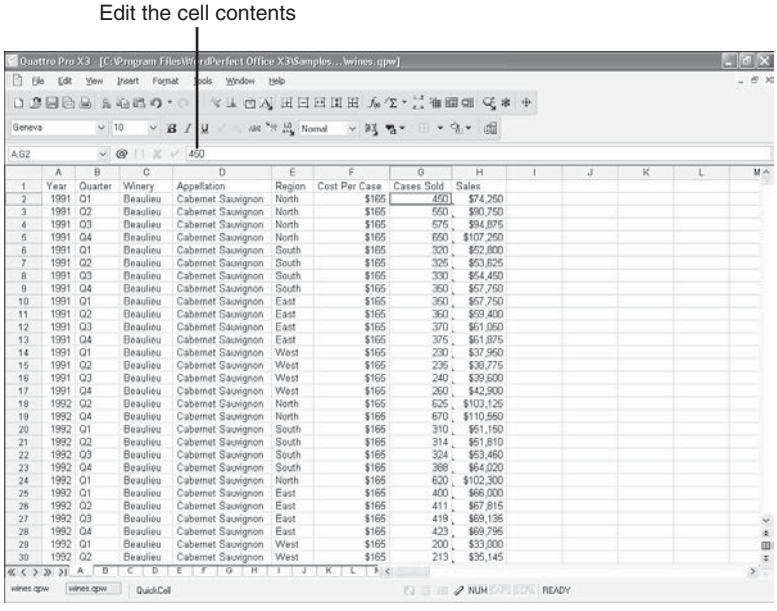


Figure 22.3
The input box turns white when active.

USING UNDO

If your finger slips and you type the wrong number, it's no big deal. You can backspace over it and try again. But if you make a big mistake, such as accidentally editing a critical formula, reconstructing the information can be tedious, if not impossible. Fortunately, Quattro Pro has the same Undo and Redo features that you have seen in WordPerfect.

To undo the last action you took on the notebook, choose Edit, Undo; click the Undo icon on the toolbar; or press Ctrl+Z. Likewise, to redo an action, choose Edit, Redo; click the Redo icon on the toolbar; or press Ctrl+Shift+Z.

MANAGING NOTEBOOK SHEETS

To better understand how you can work with more than one sheet at a time, it may help to visualize a notebook as a bound ledger. A notebook has multiple sheets just like a ledger has multiple pages. Instead of flipping through ledger pages, you click through the sheet tabs.

To make it even easier to work with multiple sheets, Quattro Pro lets you name them. When you do, the name of the sheet appears on the tab (instead of A, B, C, and so on).

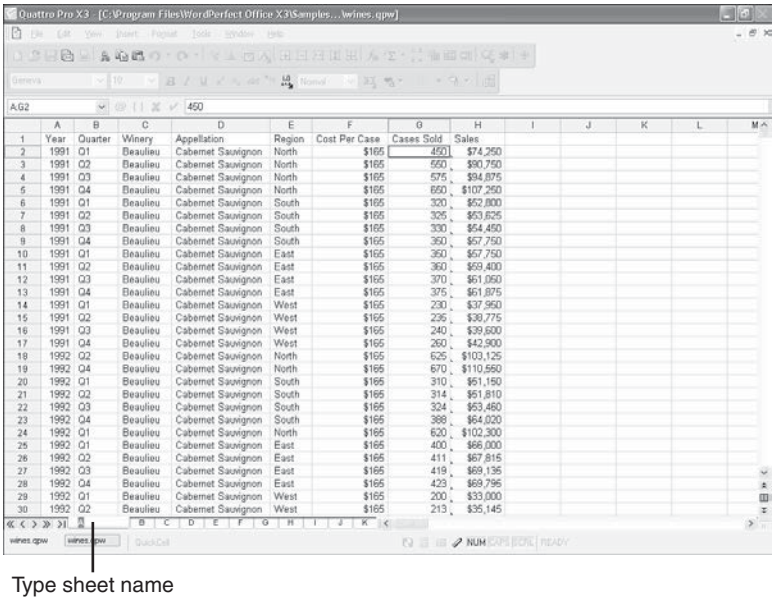
As you create new spreadsheets, consider ways that you can organize the data into separate sheets. Bear in mind that you can link information between sheets so you don't lose the interoperability of having everything on the same sheet.

NAMING A SHEET

One way to use multiple notebook sheets is to place each month's data on a separate sheet and use a 13th sheet for the yearly totals. A 14th sheet might contain charts for the first six months, a 15th might contain charts for the second six months, and a 16th sheet might contain reports.

To name a sheet

1. Double-click a sheet tab. The tab expands and the insertion point appears on the tab (see Figure 22.4).
2. Type the new name directly on to the tab.



	A	B	C	D	E	F	G	H
1	Year	Quarter	Winery	Appellation	Region	Cost Per Case	Cases Sold	Sales
2	1991	Q1	Beaulieu	Cabernet Sauvignon	North	$165	450	$74,250
3	1991	Q2	Beaulieu	Cabernet Sauvignon	North	$165	550	$90,750
4	1991	Q3	Beaulieu	Cabernet Sauvignon	North	$165	575	$94,875
5	1991	Q4	Beaulieu	Cabernet Sauvignon	North	$165	650	$107,250
6	1991	Q1	Beaulieu	Cabernet Sauvignon	South	$165	320	$52,800
7	1991	Q2	Beaulieu	Cabernet Sauvignon	South	$165	325	$53,625
8	1991	Q3	Beaulieu	Cabernet Sauvignon	South	$165	330	$54,450
9	1991	Q4	Beaulieu	Cabernet Sauvignon	South	$165	350	$57,750
10	1991	Q1	Beaulieu	Cabernet Sauvignon	East	$165	350	$57,750
11	1991	Q2	Beaulieu	Cabernet Sauvignon	East	$165	360	$59,400
12	1991	Q3	Beaulieu	Cabernet Sauvignon	East	$165	370	$61,050
13	1991	Q4	Beaulieu	Cabernet Sauvignon	East	$165	375	$61,875
14	1991	Q1	Beaulieu	Cabernet Sauvignon	West	$165	230	$37,950
15	1991	Q2	Beaulieu	Cabernet Sauvignon	West	$165	235	$38,775
16	1991	Q3	Beaulieu	Cabernet Sauvignon	West	$165	240	$39,600
17	1991	Q4	Beaulieu	Cabernet Sauvignon	West	$165	260	$42,900
18	1992	Q2	Beaulieu	Cabernet Sauvignon	North	$165	625	$103,125
19	1992	Q4	Beaulieu	Cabernet Sauvignon	North	$165	670	$110,550
20	1992	Q1	Beaulieu	Cabernet Sauvignon	South	$165	310	$51,150
21	1992	Q2	Beaulieu	Cabernet Sauvignon	South	$165	314	$51,810
22	1992	Q3	Beaulieu	Cabernet Sauvignon	South	$165	324	$53,460
23	1992	Q4	Beaulieu	Cabernet Sauvignon	South	$165	388	$64,020
24	1992	Q1	Beaulieu	Cabernet Sauvignon	North	$165	620	$102,300
25	1992	Q1	Beaulieu	Cabernet Sauvignon	East	$165	400	$66,000
26	1992	Q2	Beaulieu	Cabernet Sauvignon	East	$165	411	$67,815
27	1992	Q3	Beaulieu	Cabernet Sauvignon	East	$165	419	$69,135
28	1992	Q4	Beaulieu	Cabernet Sauvignon	East	$165	423	$69,795
29	1992	Q1	Beaulieu	Cabernet Sauvignon	West	$165	200	$33,000
30	1992	Q2	Beaulieu	Cabernet Sauvignon	West	$165	213	$35,145

Figure 22.4
The tab expands so you can type a sheet name.

NOTE

When you rename a sheet (as you have done by changing it from the default setting), formulas that refer to the renamed sheet adjust to use the new name.

TIP FROM

Laura Acklen

You can use up to 63 characters in a sheet name, including letters, numbers, and spaces. When you are naming a sheet, keep in mind that if you use long sheet names, you won't be able to see as many sheet names onscreen.

NAVIGATING TO ANOTHER SHEET

It couldn't be easier—just click a tab to move to that sheet. If you prefer to use the keyboard, Ctrl+Page Down moves you to the next sheet; Ctrl+Page Up takes you to the previous sheet. There is a also series of buttons on the application bar, right next to the sheet tabs. These buttons let you move quickly through multiple sheets.

These buttons can be used to

- Move one sheet forward.

- Move one sheet backward.

- Move several sheets forward. The number of sheets varies, depending on how long the sheet names are.

- Move several sheets backward. The number of sheets varies, depending on how long the sheet names are.

SAVING AND NAMING A NOTEBOOK

Saving a notebook in Quattro Pro is essentially the same as saving a document in WordPerfect. It's equally important that you save your work often and that you develop a good filing system for your Quattro Pro files.

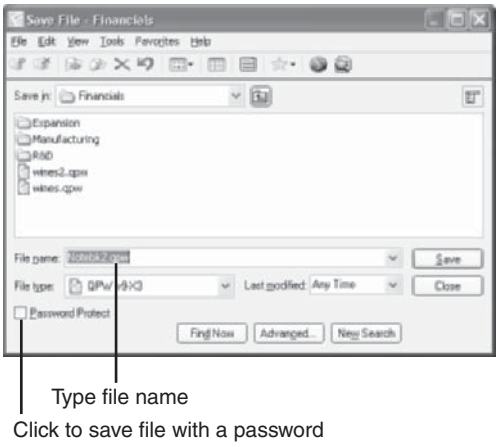
To save a new notebook

1. Click the Save button (Ctrl+S). The Save File dialog box opens (see Figure 22.5).
2. Type a name for the file in the File Name text box.
3. If necessary, navigate to the folder in which you want to save this notebook. Alternatively, you can type the drive letter and folder name with the filename.
4. (Optional) Click the Password Protect check box if you want to save the notebook with a password. Type the password when prompted.
5. Click Save.

NOTE

You can easily save a Quattro Pro file in Microsoft Excel format (and an impressive collection of other popular formats). All you have to do is select Microsoft Excel or Lotus 1-2-3, HTML, and so on in the File Type list. If you choose Microsoft Excel 97/2000/2002/2003 or Microsoft Excel v5/v7, Quattro Pro will automatically assign an .xls file extension, which identifies the file as being in Microsoft Excel format.

Figure 22.5
In the Save File dialog box, you can give a notebook a name and a location.



To save a notebook that is already named, click the Save button (Ctrl+S). Because you've already named the notebook, you don't have to enter the name again. Quattro Pro automatically saves over the existing file.

TIP FROM

Laura Acklen

Quattro Pro has a timed document backup feature that automatically makes a backup copy of your document while you work. It's already turned on and set to make a backup every 10 minutes. If you aren't able to exit Quattro Pro correctly (because of a power failure or system lockup), you'll be able to open the backup file when you restart Quattro Pro. However, if you do exit Quattro Pro correctly, the backup file will be deleted.

You can adjust the interval and take a look at where your backup files are created in the Options dialog box. Choose Tools, Settings; then click File Options (in the left side under Application). You can adjust the timed document backup interval by typing a new value in the Timed Backup Every text box or by clicking the spinner arrows next to the text box.

PRINTING THE SPREADSHEET

With fax and e-mail capabilities, we certainly don't print as much as we used to. Still, nothing replaces a printout that we can review away from the computer. With Quattro Pro, you can do more than just print out your spreadsheet. You can add headers and footers that will print on every page, just as you would in a WordPerfect document.

Row and column headings can be included so you can clearly identify the information on a spreadsheet that spans several pages. If your spreadsheet is really big, you can scale it down before you print it. Finally, you can use a Print Preview function to take a look at the spreadsheet before you print it.

SETTING THE PRINT AREA

When you're ready to print out your spreadsheet, the most important consideration is how much of the spreadsheet do you want to print. It's not like a WordPerfect document, where you have a definitive beginning and end to a document. A single Quattro Pro spreadsheet can be up to 1,000,000 rows and 18,000 columns, so you absolutely *must* indicate a print range before you print.

Thankfully, Quattro Pro won't let you accidentally print reams of paper with empty rows and columns. The program figures out the size of your spreadsheet by calculating an "active area." This area extends from cell A1 and the intersection of the last column and last row that contain entries. In Figure 22.6, the active area extends from A1 to H12. Cell H12 does not contain any data, but it is the intersection of the last row and last column used in the spreadsheet. If you were to print the spreadsheet in Figure 22.6, without specifying a print range, Quattro Pro will only print the block of cells from A1 to H12.

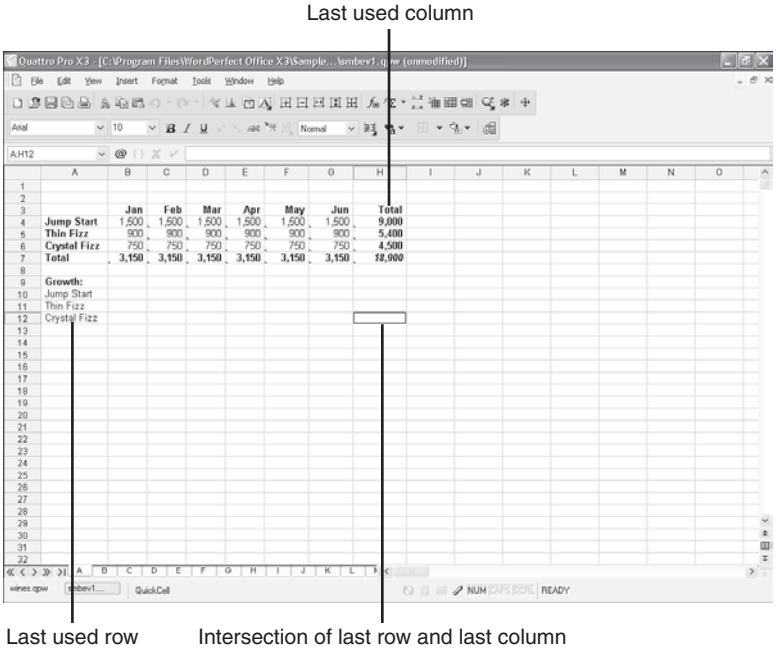


Figure 22.6
If you don't specify a print range, Quattro Pro will automatically print the active area of the spreadsheet.

To specify a print range

1. Click in the uppermost left cell for the print range.
2. Hold down the Shift key and click in the lowermost right cell. This selects a print block.
3. Choose File, Print to display the Spreadsheet Print dialog box (see Figure 22.7).

4. If necessary, click the Print tab. Notice that the Selection option is already selected since you have predefined a print block.
5. Choose Print.

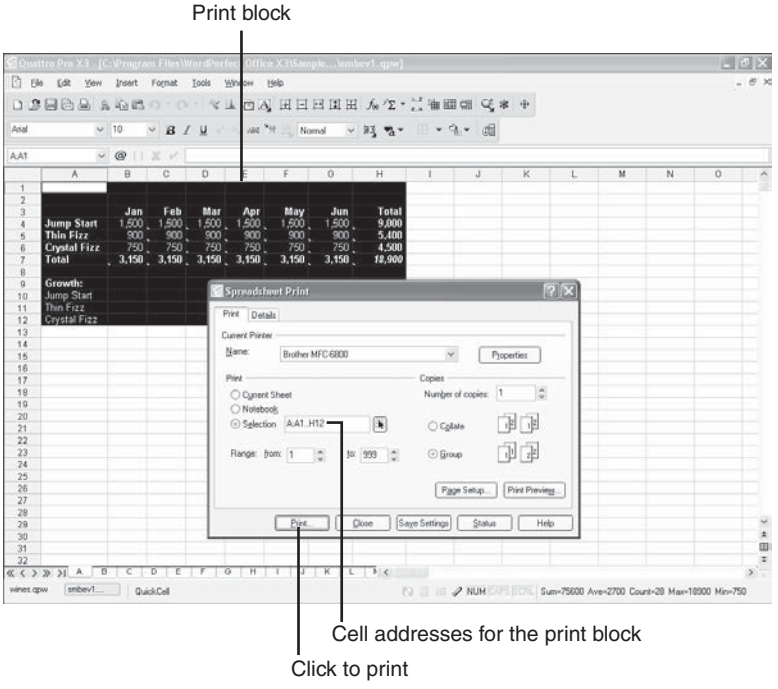


Figure 22.7
When you predefine a print block, the cell addresses appear in the Spreadsheet Print dialog box.

TIP FROM

If you prefer, you can type in the print range in the Spreadsheet Print dialog box rather than selecting the print block first. In fact, you can specify more than one print range. Let's say, for example, that you want to print the top 4 rows of the spreadsheet, skip rows 5–20 and print rows 21–35. You can type in the first print range, then type a comma, and then type in the second print range.

➔ For a more comprehensive discussion on selecting printers and setting print options, **see** "The Basics of Printing," **p. 146**. [Chapter 6].

➔ For more information on selecting cells, **see** "Selecting Cells," **p. 616**.

If the text in a column is cut off on your printout, see "Text Is Cut Off on the Printout" in the Troubleshooting section at the end of this chapter.

If you have a stack of empty pages when you print your spreadsheet, see "Extra Blank Pages" in the Troubleshooting section at the end of this chapter.

ADDING HEADERS AND FOOTERS

By definition, a header appears at the top of every page; a footer appears at the bottom of every page. You may be familiar with the concept if you have used them in WordPerfect documents. In Quattro Pro, each line of header or footer text can have three parts: a left-aligned, centered, and right-aligned section. Each section is separated by a vertical bar (|). Quattro Pro will place the text before the first vertical bar at the left margin, text after the first vertical bar in the center, and text after a second vertical bar aligned against the right margin.

You can either type the information, or you can use Quattro Pro codes to insert information for you. The advantage of using the codes is that they are automatically updated for you. For example, instead of typing in the date, and having to remember to update it, you can have Quattro Pro insert the current date for you.

To create a header and/or footer

1. Choose File, Page Setup to open the Spreadsheet Page Setup dialog box.
2. Click the Header/Footer tab to display the header and footer options (see Figure 22.8).
3. Choose Create in the Header or Footer section to enable the text box.
4. Type the information that you want to appear. You can use both text and codes to achieve the desired result.

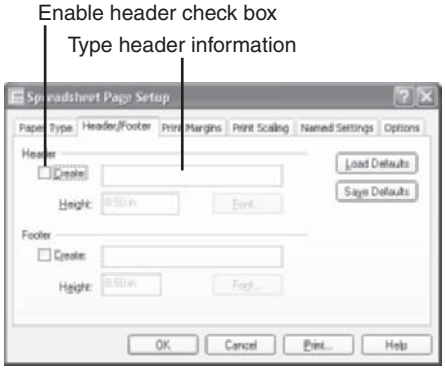


Figure 22.8
Use the Header/Footer tab to enter information that will appear at the top and/or bottom of the spreadsheet printout.

Table 22.1 lists the codes that you will use most often. For a complete list of the codes, search for the topic "header and footer codes" in the Quattro Pro help topics.

➔ For more information on searching the help topics, **see** "Getting Help," **p. 611**.

TABLE 22.1 HEADER AND FOOTER CODES

Code	Description
| (single vertical bar)	Centers text that follows
|| (double vertical bar)	Right-aligns text that follows
#p	Displays the current page number
#P	Displays the number of pages in the spreadsheet
#d/#D	Displays the current date in short/long format
#t/#T	Displays the current time in short/long format
#f	Displays the notebook filename with no path
#F	Displays the notebook filename with the path
#n	Moves text that follows to a new line

ADJUSTING PRINT MARGINS

It almost goes without saying, but print margins are the area between the edge of the paper and the area where your spreadsheet will print. The Spreadsheet Page Setup dialog box has a Print Margin tab where you can adjust the print margins.

To adjust the print margins

1. Choose File, Page Setup to display the Spreadsheet Page Setup dialog box.
2. Click the Print Margins tab to display the print margins settings (see Figure 22.9).
3. Type the preferred margin settings in the Top, Bottom, Left, and Right text boxes.

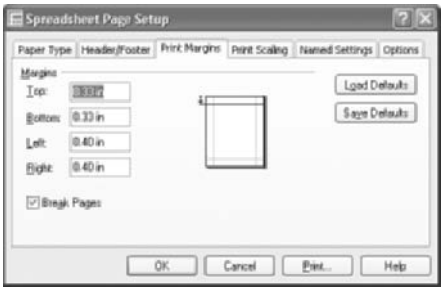


Figure 22.9
Adjust the print margins in the Print Margins tab of the Spreadsheet Page Setup dialog box.

The default settings are .33 inches for the top and bottom margins, and .4 inches for the left and right margins. If you have a printer that can print to the edge of the paper, you can reduce the margin settings below the default settings. However, most printers have an unprintable zone of at least .25 inches. You can check your printer manual to see what the minimum margins are.

SETTING PRINT SCALING

Print scaling doesn't sound very exciting, but it may be one of the most useful tools for printing spreadsheets. Using the print scaling options, you can specify how many pages you want and have Quattro Pro adjust the scaling for you. This is a lot like the Make-It-Fit feature in WordPerfect. Let's say, for example, that you have a spreadsheet that prints on $2^1/_2$ pages. You can use print scaling to reduce the size of the spreadsheet so that it fits on 2 pages.

To set the print scaling options

1. Choose File, Page Setup to display the Spreadsheet Page Setup dialog box.
2. Click the Print Scaling tab to display the print scaling options (see Figure 22.10). Choose from one of these options:
   - Enable the Scale To option button and either type the percentage, or use the spinner arrows to adjust the value.
   - Enable the Shrink To option button and type the number of pages for the width and height (or use the spinner arrows).

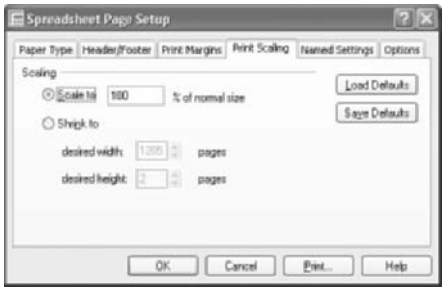


Figure 22.10
Use the print scaling options to reduce or enlarge the printout of a spreadsheet.

NOTE

> When you use the print scaling options, it is especially important that you preview the spreadsheet before you print it. The result may be too small for you to read so you may want to adjust the settings before you print.

If you need a magnifying glass to read your spreadsheet printout, see "Printout Is Too Small" in the Troubleshooting section at the end of this chapter.

USING PRINT PREVIEW

The Print Preview feature shows you how your spreadsheet will look when you print it. Get into the habit of using this feature before you send a spreadsheet to the printer. You'll save paper and other printing resources.

To preview a spreadsheet before printing

1. Choose File, Print Preview to display the spreadsheet as it will look when printed (see Figure 22.11).
2. Use the buttons on the Print Preview toolbar to move from page to page, adjust the zoom, and fine tune the print options in the Spreadsheet Page Setup dialog box.
3. Click the Close button to return to the notebook window.

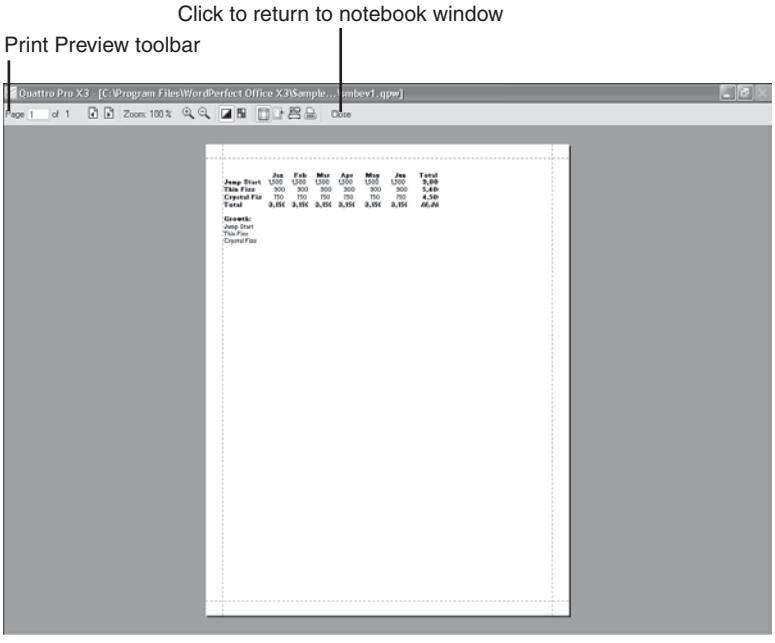


Figure 22.11
Print Preview is a valuable tool that can save paper, printer resources, and frustration.

LOCATING AND OPENING A NOTEBOOK

Quattro Pro's Open File dialog box is the easiest way to locate and to open existing files. Simply choose File, Open (or press Ctrl+O) and Quattro Pro displays the dialog box shown in Figure 22.12.

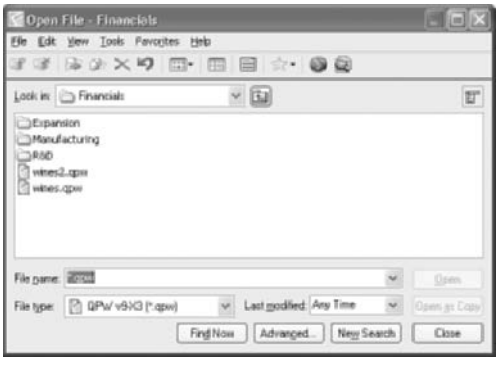


Figure 22.12
The Open File dialog box in Quattro Pro is identical to the one you use in WordPerfect.

There is a comprehensive discussion of how to locate and open documents with the Open File dialog box in Chapter 2, "Opening and Editing Documents" (within the WordPerfect section). The concepts are essentially the same so rather than repeat the information here, please refer to "Finding and Opening Documents" in Chapter 2 for more information.

There is one difference between the two dialog boxes in WordPerfect and Quattro Pro that is worth mentioning. In WordPerfect, the default file type in the Open File dialog box is All Files (*.*). In Quattro Pro, the default is QPW v9-x3 (*.qpw), which means just the Quattro Pro files. If you are trying to open an Excel or Lotus file, which doesn't have a .qpw extension, it will not show in the list of available files. If you don't notice the difference in the file type list, you may think the file you are looking for just isn't there. To view all files, open the File Type drop-down list and choose All Files (*.*).

GETTING HELP

If you have ever used Help in WordPerfect, you already know how to use it in Quattro Pro. In fact, the Help feature in Windows applications works essentially the same way. A section for Help topics is organized by category or project, and an index can be searched with keywords. In Corel products, there is also a page that allows you to search the knowledge base, provided you have an Internet connection. See the section titled "Getting Help" in Chapter 1, "Getting Comfortable with WordPerfect," for more information on the Help topics.

For those making the transition from Microsoft Excel, Quattro Pro has a special help section just for you. Choose Help, Microsoft Excel Help. A help topic titled "Quattro Pro compatibility with Microsoft Excel" appears (see Figure 22.13). This topic and the topics linked to it have information on how to make the transition easier.

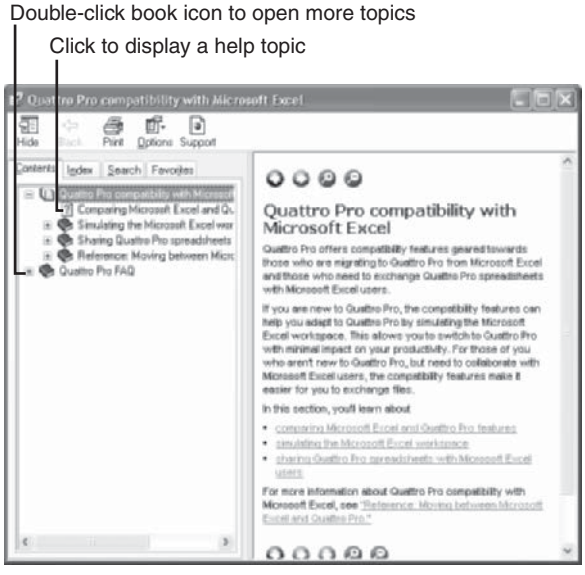


Figure 22.13
There is a special section to help Microsoft Excel users make the transition to Quattro Pro.

EXITING QUATTRO PRO

The quickest way to exit Quattro Pro is to click the application Close button. You'll see two Close buttons in the upper-right corner. Don't let this confuse you—the top one is the application Close button; the bottom one is the notebook Close button.

When you closed your spreadsheet, you clicked the bottom Close button. Now, click the top Close button to close the application window and exit Quattro Pro.

Exit Quattro Pro by doing the following:

1. Click the application Close button. Before closing the program, Quattro Pro prompts you to save your changes (in every open notebook window).
2. If necessary, give filenames to any spreadsheets that you have not yet saved and named.

TROUBLESHOOTING

HAVING TROUBLE STARTING QUATTRO PRO

I'm trying to start Quattro Pro, but I can't find it on my Start menu.

The program hasn't been installed on your system yet. Insert the WordPerfect Office X3 CD in the CD drive. If the Setup program doesn't start in a minute or two, choose Start, Run, browse to the CD drive, and then double-click `setup.exe` to start the installation wizard.

ASTERISKS INSTEAD OF NUMBERS

I typed a number in a cell, but instead of the number, I see asterisks. What's going on?

The most common cause is when a cell is too small to accommodate the value that you type in. Quattro Pro displays a series of asterisks instead. Don't worry—your number is still there, it just isn't displayed. When you adjust the column width, the value will appear.

TEXT IS CUT OFF ON THE PRINTOUT

I selected the correct print block, but the text is cut off on the printout. What did I do wrong?

When you enter a long label, it will spill over into empty cells to the right. However, if a label spills over to a cell outside the print block, only the text within the block is printed. You have two options: Either extend the print block area, or expand the column.

EXTRA BLANK PAGES

When I select a print block and print my spreadsheet, a stack of blank pages prints after the spreadsheet. What am I doing wrong?

When you select a print block, you need to make sure that you select Selection in the Print dialog box. Otherwise, the entire spreadsheet prints, which means you have a lot of blank pages to deal with.

PRINTOUT IS TOO SMALL

I adjusted the print scaling and now my spreadsheet information is too small to read and there is a lot of whitespace on the right side and on the bottom of the page. What did I do?

It sounds as though you forgot to specify a print block and Quattro Pro tried to print too much spreadsheet. First, select only the information that you want printed. In the Print dialog box, make sure you choose Selection.

If you print only the selected cells and the print is still too small to read, consider scaling to a certain percentage, rather than specifying the number of pages. The printout will be longer, but at least you'll be able to read it without magnifying glasses.

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CHAPTER 23

Learning Important Editing Skills

In this chapter

by Laura Acklen

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SELECTING CELLS, ROWS, AND COLUMNS

Of all the skills you will acquire when working with spreadsheets, learning how to select cells is one of the most important. The ability to select a block of cells enables you to take an action on a group of cells, rather than one cell at a time. Think of how much time you can save by acting on a series of rows, instead of each row separately.

Once you've selected the cells (or rows or columns) that you want to work with, you can move, copy, delete, or apply formatting to them. You'll learn how to do each of these things in this chapter and in the following chapter.

SELECTING CELLS

You can select cells using both the keyboard and the mouse. You're likely to use both methods, so take a few seconds to learn some basic techniques.

Let's look first at selecting cells using the keyboard. As you know, you can use the arrow keys to move the active cell border around in the spreadsheet. The first step is to move the active cell border to the first cell that you want to select. Now, use the arrow keys to select other cells. To select larger blocks, you can use the keyboard navigation keys that you learned about in Chapter 2, "Opening and Editing Documents."

➔ For more information on navigation shortcuts, **see** "Getting Around in a Document," **p. 41**.

Selecting cells with the mouse is also easy, especially if you are comfortable clicking and dragging with the mouse. Here are some techniques that you can use to quickly select a group of cells:

- Click in the cell that marks the upper-left corner of your selection. Hold down the Shift key and click in the cell that marks the lower-right corner of the selection (see Figure 23.1).
- Click the first cell. Hold down the Ctrl key to click other cells.
- Click and drag across the cells to select them.

TIP FROM

You can use the mouse and the Ctrl key to select non-contiguous blocks of cells. After you have selected the first block, hold down the Ctrl key; then use the mouse to click and drag across another block of cells. Continuing to hold down the Ctrl key, continue clicking and dragging to select as many blocks of text as necessary. Now, you can take action on all of these cells at once.

SELECTING ROWS AND COLUMNS

Quattro Pro has handy shortcuts for selecting rows and columns. To select a row, click the row number on the row border. If you want to select more than one row, click the row number, and then drag across the rows to select them.

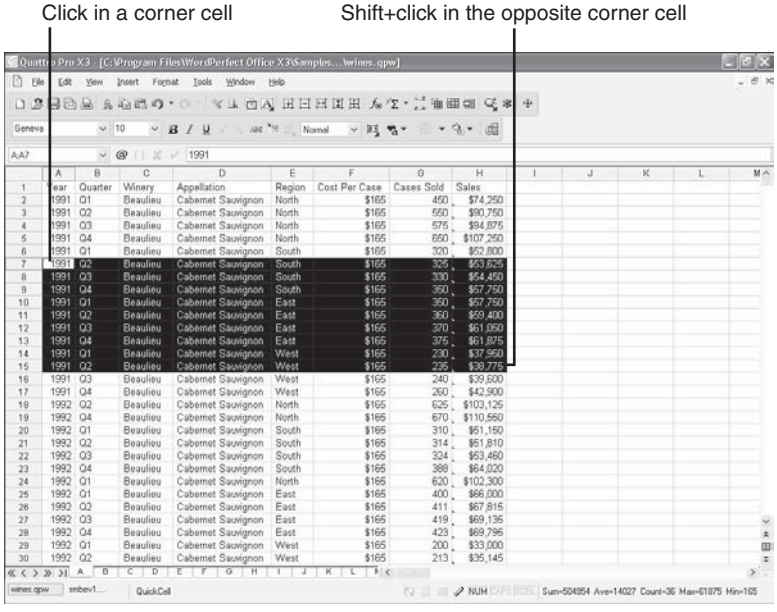

Figure 23.1
A block of contiguous cells can be quickly selected in just two clicks.

To select a column, click the column letter on the column border. If you need to select more than one column, click the column letter, and then drag through the columns to select them (see Figure 23.2).

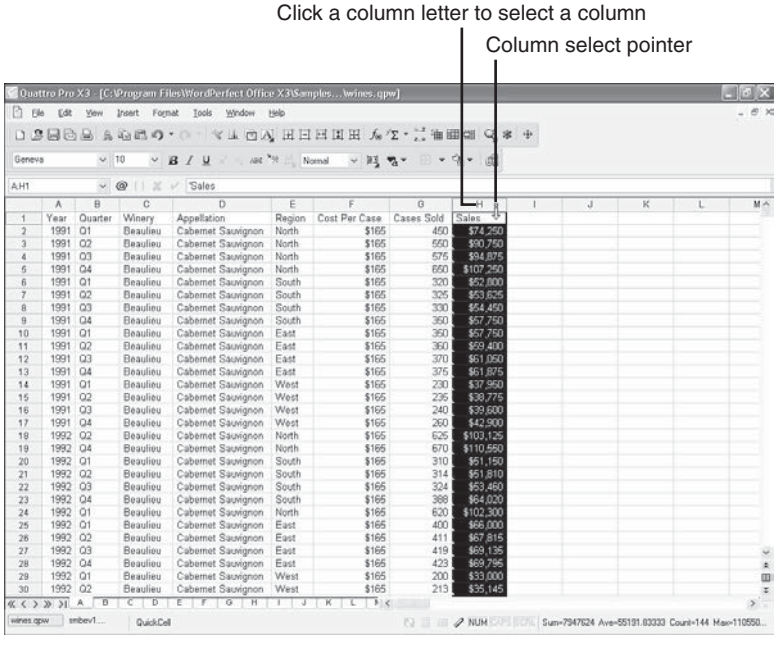

Figure 23.2
An entire column or row can be selected by clicking the row number or column letter.

MOVING AND COPYING INFORMATION

So, you've got some cells selected. Now what? One of the most frequent tasks you will perform as you build spreadsheets is moving and copying information. You may decide that you need more room for a specific section and so you need to move some of your data. Or, you find that it is easier to copy a block of data so you can repurpose it somewhere else. Whatever the reason, you have several methods that you can use to move and copy data in a spreadsheet.

Just to clarify the terms, when you copy the cells and leave a copy in the original location, you are *copying and pasting*. If you move the cells and you want to delete the information in the original location, you are *cutting and pasting*.

MOVING CELLS, ROWS, AND COLUMNS

You can move data in cells using the same techniques that you learned to move text with WordPerfect. In Quattro Pro, you can move with drag-and-drop, or with the Cut and Paste commands.

To move selected cells with drag-and-drop

1. Select the cell(s), row(s), or column(s).
2. Point to the edge of the selection and wait for a four-sided arrow (see Figure 23.3).

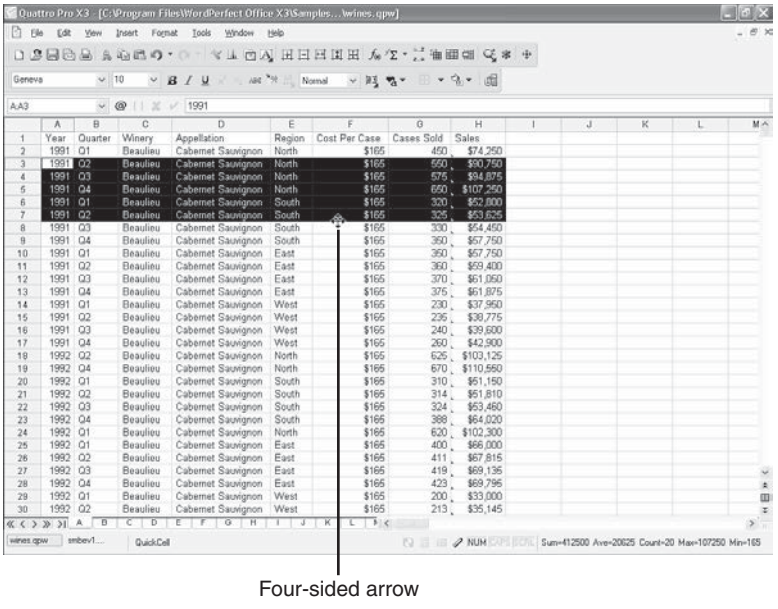

Figure 23.3
Using the mouse to drag-and-drop a selection is the quickest method to move information.

3. Drag the selection to the new location and release the mouse button to move the selection.

NOTE

Notice that as you drag the selection, an outline appears to illustrate where the block will appear when you "drop" it (release the mouse button). Also, the mouse pointer changes to a pointer with a rectangular box attached to it. This is the move pointer.

If the move operation will replace existing data, you will get a warning message. Think carefully before responding Yes or No. If you opt to replace the existing data and then change your mind, you can use Undo to reverse your action and recover the data.

To move selected cells with Cut and Paste

1. Select the cell(s).
2. Click the Cut button or press Ctrl+X to move the selection.
3. Click in the upper-left cell of the new location.
4. Click the Paste button or press Ctrl+V to paste the data. Be careful where you paste because, unlike drag-and-drop, you won't get a warning message before replacing existing data.

TIP FROM

There are a couple of other shortcuts that you might find helpful. You can right-click a selection and choose Move and Paste from the QuickMenu. You can also press Shift+Delete to cut and Shift+Insert to paste.

TIP FROM

Quattro Pro also has a Paste Special option that offers a huge variety of options for pasting in data. One of the most popular options is copying row/column sizes. Normally, when you copy a section where the row or column sizes have been changed, when you paste it elsewhere (for example, a blank sheet), the custom row/column sizes don't come with the copy/paste—you have to resize those things manually. With Paste Special, you can enable the Row/Column Sizes option, and have the row and column sizes copied over as well. Choose Edit, Paste Special to display the Paste Special dialog box where you can enable and disable the paste options.

NOTE

The Windows Clipboard is an area of your computer's memory that stores information that you cut or copy. If you cut (or copy) another selection, this selection replaces whatever was in your Clipboard. If you turn off your computer, you lose the complete contents of the Clipboard. Corel's Clipbook program allows you to save multiple clips to a clipboard and then paste them in whatever order you choose. See "Using the Clipbook Program" in Chapter 13, "Importing Data and Working with Other Programs," for more information.

COPYING CELLS, ROWS, AND COLUMNS

You can copy data to other cells using the same techniques that you learned to copy text with WordPerfect. In Quattro Pro, you can copy with drag-and-drop, or with the Copy and Paste commands.

To copy selected cells with drag-and-drop

1. Select the cell(s).
2. Point to the edge of the selection and wait for a four-sided arrow.
3. Hold down the Ctrl key and drag the selection to the new location. The mouse pointer changes to a pointer with a rectangular box and a box with a plus sign attached to it (see Figure 23.4). This is the copy pointer.
4. Release the mouse button to copy the selection.

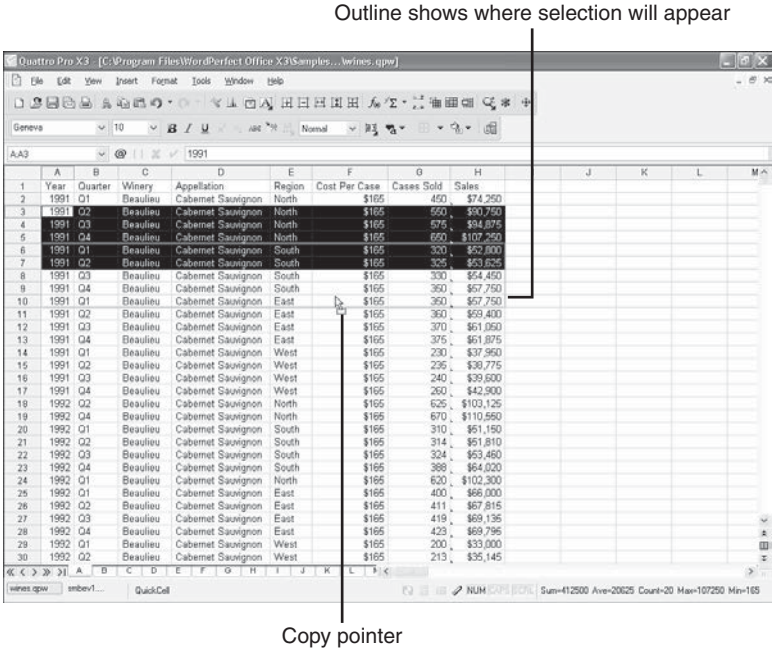

Figure 23.4
Based on the appearance of the pointer, you can tell at a glance if you are moving or copying text.

If the copy operation will replace existing data, you will get a warning message. Think carefully before responding Yes or No. If you opt to replace the existing data and then change your mind, you can use Undo to reverse your action and recover the data.

To copy selected cells with Copy or Paste

1. Select the cell(s).
2. Click the Copy button or press Ctrl+C to copy the selection.
3. Click in the upper-left cell of the new location.

4. Click the Paste button or press Ctrl+V to paste the data. Be careful where you paste because, unlike drag-and-drop, you won't get a warning message before replacing existing data.

TIP FROM

There are a couple of other shortcuts that you might find helpful. You can right-click a selection and choose Copy and Paste from the QuickMenu. You can also press Ctrl+Insert to copy and Shift+Insert to paste.

TIP FROM

You can create a copy of a spreadsheet with formulas and formatting only—no entries or values—and paste it into another area of the current sheet, or onto another sheet altogether. Choose Edit, Copy Cells to display the Copy Cells dialog box. There is a tool called a Range Picker next to the From and To text boxes. This tool minimizes the current dialog box, so you can select the cells that you want to copy. When you are finished selecting the cells, press Enter, or click the Maximize button on the dialog box title bar to restore the dialog box. The cell addresses for the selected block appear in the From box. Now, use the Range Picker again to select the destination cells. Enable the Model Copy check box, and then remove the check mark next to Number Cells. Click OK.

If the results of a paste operation are not what you expected, see "Correctly Pasting Blocks of Cells" in the Troubleshooting section at the end of this chapter.

If you are having trouble clicking and dragging selected cells, see "Clicking and Dragging Isn't Working" in the Troubleshooting section at the end of this chapter.

USING THE QUICKFILL AND FILL SERIES FEATURES

Entering information into spreadsheets can be very tedious, especially when much of the information is repetitive. For example, spreadsheets that track sales data always include labels for months of the year. Spreadsheets that track loans have dates in monthly increments. Sure, it's easy enough to type the monthly labels and enter in the dates, but if there is a way to do it quickly, think how much time you'll save in the long run.

How is this done you ask? Through the QuickFill and Fill Series features. QuickFill figures out what you want based on a few "sample" cells. There are a collection of predefined fill series that will increment for you. And finally, you can create your own fill series to quickly plug in information that is unique to you.

ENTERING DATA QUICKLY WITH QUICKFILL

QuickFill is an amazing tool. It can figure out what you want in a fill series based on what you type in the first cell or series of cells. It's very helpful for basic series such as line numbers, monthly labels, ordinal numbers, days of the month, and so on.

In most cases, all you have to do is type one sample value in the first cell and Quattro Pro can figure it out. For example, if you type **`January`**, Quattro Pro assumes that you want to insert monthly labels. If you type **`Monday`**, Quattro Pro assumes that you want to insert the days of the week. These sample values are also referred to as "seed values." For more information on the seed values that you can use, search the help topics for "QuickFill seed values."

To use QuickFill with a sample series

1. Click in the first cell and type the first label. In many cases, this is enough. If you want to use an increment other than 1, go ahead and type at least one more sample value.
2. If necessary, move to the second (and third) cell and type the sample values.
3. Select the sample values and continue selecting to the last cell that you want to fill (see Figure 23.5).
4. Click the QuickFill button to fill in the series (see Figure 23.6).

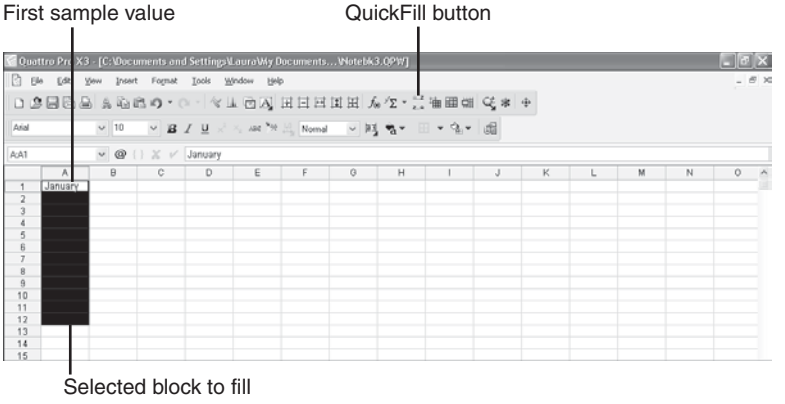

Figure 23.5
The number of monthly labels that will be inserted depends on how many cells you select.

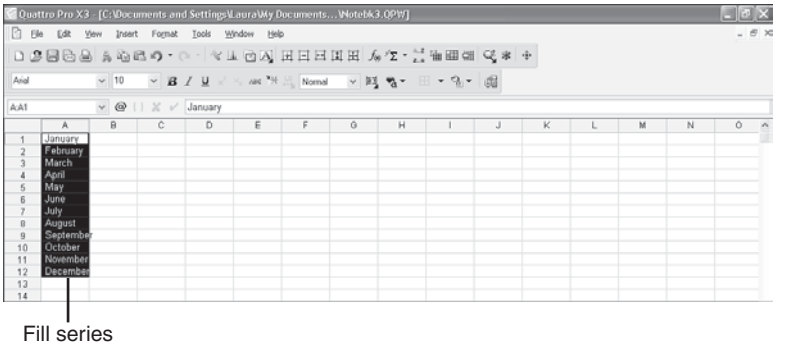

Figure 23.6
In just a few seconds, a series of monthly labels has been inserted.

SELECTING A FILL SERIES

In addition to using seed values to start a fill series, you can select a series from the QuickFill dialog box. You don't have to type anything first and you have more options to choose from.

To select a fill series

1. Select the block of cells that you want to fill. The block should not contain any sample values.

2. Click the QuickFill button to open the QuickFill dialog box.
3. Open the Series Name drop-down list to see a list of predefined fill series (see Figure 23.7). As you can see, there are several different Quarter labels, abbreviated months and long/short week days.

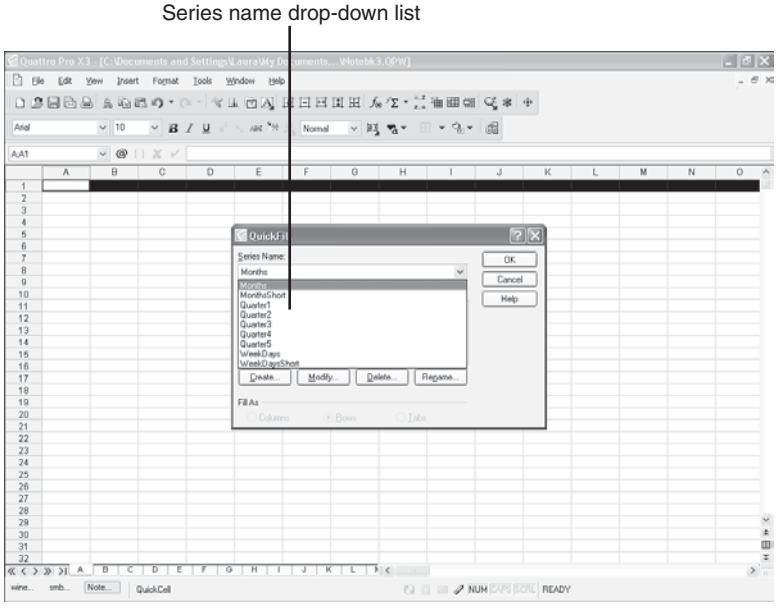

Figure 23.7
Choose a fill series from the list in the QuickFill dialog box.

4. Choose OK to insert the series in the selected cells (see Figure 23.8).

TIP FROM

You can also use QuickFill to name a series of sheets. Click in a single, empty cell; then click the QuickFill button. Select a series from the Series Name drop-down list; then choose Tabs in the Fill As section. Choose OK. You should now see labels on your sheet tabs.

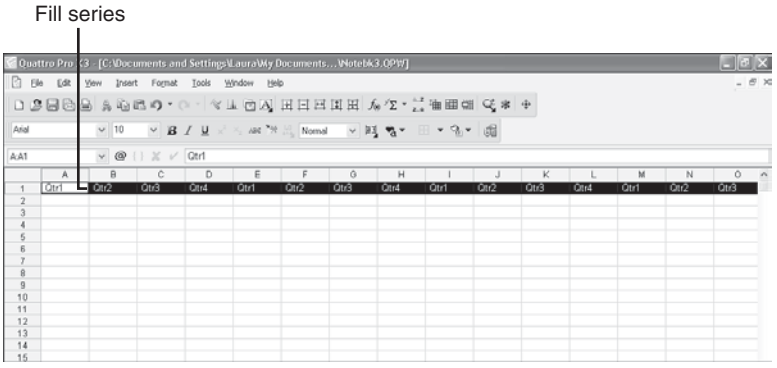

Figure 23.8
The number of items that will be inserted depends on how many cells you select.

DEFINING A CUSTOM QUICKFILL SERIES

Let's take this great time-saving concept one step further. Consider how often you enter company-specific spreadsheet labels that don't ever change. You might be entering retail store location names and store numbers, names and ID numbers of the sales people for a certain region, and product names and numbers. The possibilities are endless.

You can still use the QuickFill feature, even though the information is specific to your work. You can create your own custom QuickFill series. Once you've defined your own custom series, you can use it over and over again.

There are two ways to create the custom series. If you have already typed the information into a spreadsheet, you can use it to create the series. Otherwise, you can create the custom series from scratch by typing in the entries into the Create Series dialog box.

To create a custom QuickFill series from an existing spreadsheet

1. Open the spreadsheet that contains the entries.
2. Choose Edit, Fill, Define QuickFill to display the Define Fill Series dialog box.
3. Select Create to display the Create/Modify Series dialog box.
4. Choose Extract to display the Extract Values dialog box (see Figure 23.9). There is a Range Picker button that allows you to switch back to the spreadsheet so you can select the cells that you want to use to define the series.

Figure 23.9
The easiest way to define a custom series is to create it from existing entries.

5. Either type the cell addresses for the block of cells, or click the Range Picker button to switch back to the spreadsheet and select the block of cells. When you are finished selecting the cells, press Enter or click the Maximize button in the Extract Values title bar to restore the dialog box.
6. Type a name for the custom QuickFill series in the Series Name text box.
7. Choose OK, OK, and then Close to complete the definition of the custom series.

To create a custom QuickFill series from scratch

1. Choose Edit, Fill, Define QuickFill to display the Define Fill Series dialog box.
2. Choose Create to display the Create/Modify Series dialog box (see Figure 23.10) .

Figure 23.10
You can build a list of entries for a custom QuickFill series in the Create/Modify Series dialog box.

3. Type a name in the Series Name text box.
4. Click in the Value text box and type the first value.
5. Choose Add to place the value in the list box. Alternatively, you can press Enter to add the entry to the list.
6. Type the second value in the Value text box, and then click Add.
7. Continue adding values until you have completed the series.
8. Choose OK, OK when you are finished.

To use a newly created series, select the cells that you want to fill, and then choose Edit, QuickFill. Select the series name in the QuickFill dialog box, and then choose OK.

To modify a series, choose Edit, Fill, Quickfill. Select the series in the Series Name drop-down list, and then choose Modify. In the Create/Modify Series dialog box, make your changes. Choose OK, OK when you are finished.

NOTE

When you create a custom QuickFill series, it will be available for use in all of your Quattro Pro notebooks, not just the notebook that was open when you created the series.

ASSIGNING NAMES TO CELLS

Remembering cell addresses can be a challenge when you are building formulas, especially when you have to specify the addresses for a block of cells. The idea behind naming cells is to be able to reference a cell by name rather than by cell address. This is incredibly useful when you build formulas because you don't have to remember the exact cell address, only a name. You can assign a name to a single cell or to a range of cells.

NOTE

Naming cells also comes in handy if you plan to export portions of your spreadsheet for use in another application. One of the options you will have is to export a named range.

NAMING CELLS

There are several advantages to creating cell names. First, if you move the contents of a named cell, the name is still associated with those contents, regardless of which cell you place it in. Second, naming a cell range makes it easier to understand the formula. For example, +principal+interest is easier to interpret than C3+D4. And finally, using cell names is more accurate. If you mistype a cell name, Quattro Pro will let you know. If you make a mistake on a cell address, you will be working with the wrong cell(s).

To name a cell or block of cells

1. Select the cell(s).
2. Choose Insert, Name, Name Cells (or press Ctrl+F3) to display the Cell Names dialog box (see Figure 23.11).

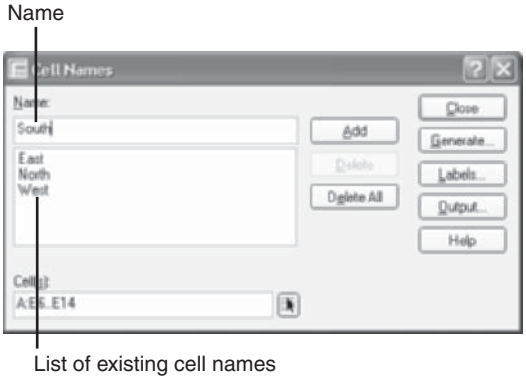

Figure 23.11
You can name a single cell or group of cells in the Cell Names dialog box.

3. Type a unique name in the Name text box. Be careful not to use a name that already appears in the list, or you will accidentally replace it.
4. Click Add.

NOTE

> Cell names cannot be longer than 63 characters and should not contain mathematical symbols (such as plus signs, dashes, asterisks, or slashes). Search through the help topics for "guidelines for naming cells" for a complete list of guidelines.

CREATING A CELL NAME TABLE

Get into the habit of documenting the cell names that you create in a spreadsheet. It's easy to do in Quattro Pro. You can generate a two-column table with the cell names and cell addresses anywhere in your spreadsheet. Pick an area where the table won't overwrite existing information and let Quattro Pro do the rest.

1. Choose Insert, Name, Name Cells, Output to display the Name Table dialog box (see Figure 23.12).

Figure 23.12
The Range Picker lets you go back to the spreadsheet and click on the cell that you want to use.

2. Use the Range Picker to select an area for the table. (You can also just click in the first cell and let Quattro Pro use whatever space is necessary.)
3. Click OK, and Quattro Pro builds the table.
4. Choose Close to clear the Cell Names dialog box so you can see the table (see Figure 23.13).

If the information in your cell name table is incorrect, see "Cell Addresses Are Incorrect" in the Troubleshooting section at the end of this chapter.

REDEFINING A CELL NAME

A cell name can be edited to change the cell address(es) that has been assigned to it. Cell names can also be deleted if you no longer want to use them.

To change the cells assigned to a name

1. Choose Insert, Name, Name Cells to open the Cell Names dialog box (refer back to Figure 23.11).

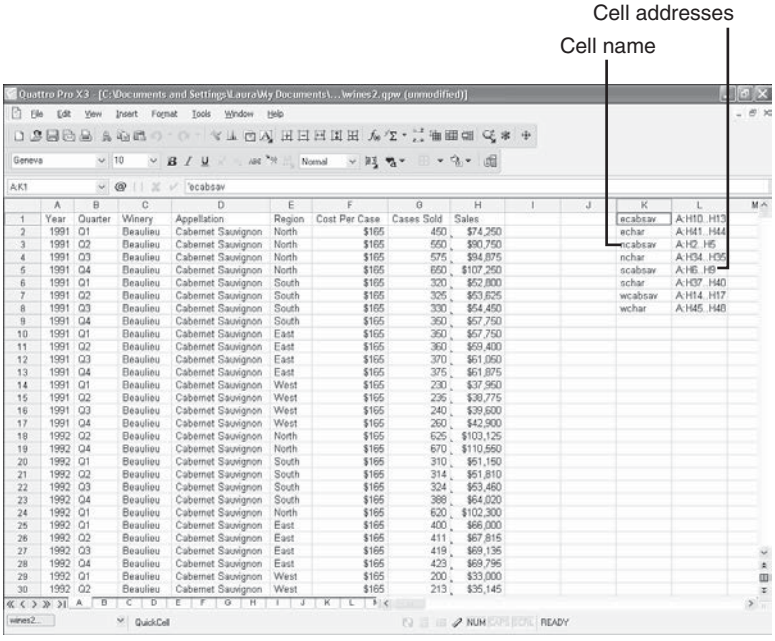

Figure 23.13
Generating a cell name table is a great way to keep track of the cell names.

2. Choose an entry from the Name list.
3. Choose Delete to remove the entry. Now, redefine the entry.
4. Either type the new cell address(es) in the Cell(s) text box or use the Range Picker to switch back to the spreadsheet where you can click a cell (or select a block of cells).
5. Type a name in the Name text box, and then choose Add.

USING THE WRITING TOOLS

The line between documents and spreadsheets is becoming increasingly blurred. Some WordPerfect tables look just like a spreadsheet and most of us have learned that Quattro Pro isn't just for numbers. For that reason, the availability of writing tools is just as important in Quattro Pro as it is in WordPerfect.

You have access to the same tools that you use in WordPerfect: Find and Replace, Spell Checker, Dictionary, Thesaurus, and QuickCorrect. These features all work essentially the same way that they do in WordPerfect. For that reason, a brief discussion is given here, along with any differences that exist between the writing tools in the two applications. You are encouraged to review the applicable sections in the WordPerfect chapters for more information.

FINDING AND REPLACING INFORMATION

The Find and Replace feature in Quattro Pro allows you to quickly locate information in cell formulas or in cell values, and to replace them if desired. You can also set conditions for the search to narrow it down. For example, you might search a spreadsheet for sales figures that are greater than $30,000.

To find and replace information in a spreadsheet

1. Choose Edit, Find and Replace (or press Ctrl+F) to display the Find and Replace dialog box (see Figure 23.14).

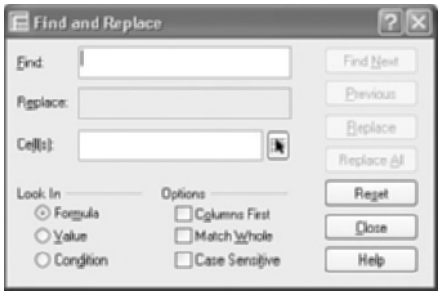

Figure 23.14
You can search for information in cell formulas or values using the Find and Replace feature.

2. Type the text or value that you want to locate in the Find text box.
3. If necessary, type the replacement text or value in the Replace text box.
4. (Optional) You can select a range of cells to search through; otherwise, Quattro Pro will search the entire sheet. Either type the cell addresses that you want to search through, or use the Range Picker to select the cells in the spreadsheet (then press Enter or click the Maximize button on the Find and Replace title bar to restore the dialog box).
5. In the Look In section, enable one of the following options:
   - **Formula**—Finds information in a formula.
   - **Value**—Finds information in a value.
   - **Condition**—Compares cells in the spreadsheet with the conditions that you specified in the Find text box.
6. Choose Find Next to start the search.

When Quattro Pro locates the search data, you have the following options:

- Click Find Next to continue the search.
- Click Previous to move back to the previous instance.
- Click Replace to replace this occurrence of the search data with the replacement data.
- Click Replace All to replace all the rest of the occurrences without further confirmation from you.

- Choose Reset if you want to start over with a new search.
- Click Close if you're just using Find to locate your place in a spreadsheet and you want to get to work.

You can also set the following search options:

- Enable the Columns First check box if you want to search down columns before searching across rows.
- Enable the Match Whole check box if you only want Quattro Pro to locate an exact match.
- Enable the Case Sensitive check box if you only want to locate text with the capitalization in the Find text box.

➔ For more information on using the Find and Replace feature, **see** "Searching for Text by Using Find and Replace," **p. 126**.

If Find and Replace isn't locating your search text, see "Find and Replace Isn't Working" in the Troubleshooting section at the end of this chapter.

SPELL CHECKING A SPREADSHEET

The labels and explanatory text in your spreadsheet should be just as accurate as the values and formulas. To that end, it is strongly recommended that you spell check your spreadsheet before you send it off. The Spell Checker will alert you to misspelled words, duplicate words, and irregular capitalization.

To spell check a spreadsheet

1. Choose Tools, Spell Checker (or press Ctrl+F1) to display the Writing Tools dialog box (see Figure 23.15). As it is in WordPerfect, the Writing Tools dialog box has tabs for the Spell Checker, Thesaurus, and Dictionary. There is not a tab for Grammatik in Quattro Pro.
2. Choose from the following options to correct the misspelled word, add the word to a word list, or skip the word:
   - To correct a mistake manually, click in the document window, correct the problem, and then choose Resume to continue spell checking.
   - To replace a misspelled word with the correctly spelled word, select the correctly spelled word in the Replacements list box, and then choose Replace. In the case of duplicate words and irregular capitalization, you can select the single word, or the word with correct capitalization, in the Replacements list box (before choosing Replace).
   - If this is a frequently misspelled word, select the correct spelling in the Replacements list box, and then choose Auto Replace to add the combination to the QuickCorrect list.
   - If the correct spelling doesn't appear in the Replacements list, edit the word manually in the Replace With box, and then choose Replace.

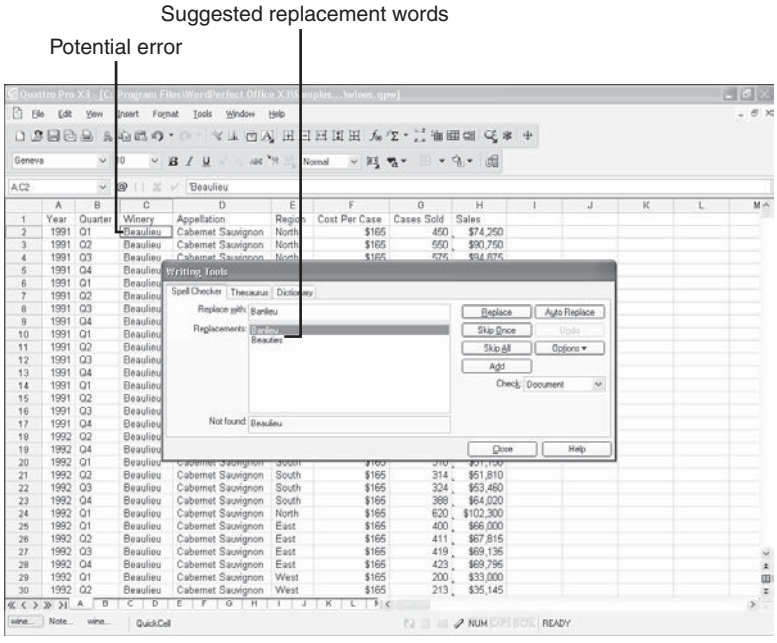

Figure 23.15
Spell Checker, Thesaurus, and Dictionary are all integrated into the same dialog box.

- To skip the word here but have Spell Checker stop if it finds it again, click Skip Once.
- To skip the word here and for the rest of the document, click Skip All.
- To add this word to the active user word list, click Add.
- If you accidentally replace the misspelled word with the wrong replacement word, click Undo.

By default, Spell Checker checks the entire spreadsheet. If you don't want to check the entire spreadsheet, select the cells that you want to check first.

➔ For more information on using the Spell Checker feature, **see** "Spell Checking a Document," **p. 110**.
➔ For more information on using the Dictionary feature, **see** "Using the Dictionary," **p. 122**.
➔ For more information on using the Thesaurus feature, **see** "Looking Up Words in the Thesaurus," **p. 121**.

USING QUICKCORRECT

The QuickCorrect feature in Quattro Pro has a built-in list of frequently misspelled words and typos as well as some symbols you can insert by using just a few keystrokes. You can even add your own common typos and their corrections to the QuickCorrect list.

To add entries to the QuickCorrect list

1. Choose Tools, QuickCorrect to display the QuickCorrect dialog box (see Figure 23.16).
2. In the Replace text box, type the incorrect spelling of a word.

3. In the With text box, type the correct spelling of a word.
4. Choose Add Entry.

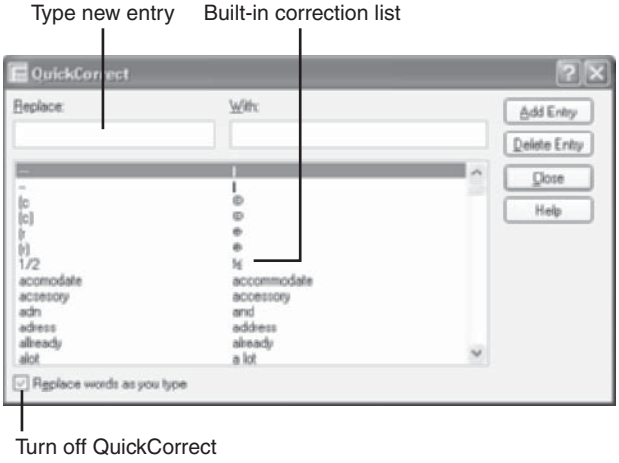

Figure 23.16
You can add commonly misspelled words to the QuickCorrect list so they are corrected automatically.

If you don't want QuickCorrect to automatically replace commonly misspelled words, you can disable the feature. Simply remove the check mark in the Replace Words As You Type check box. Furthermore, you can remove entries that you no longer want to use. Select the entry in the list and choose Delete Entry.

TIP FROM

You can use QuickCorrect to expand abbreviations and insert frequently typed phrases into your spreadsheets. Simply create a QuickCorrect entry with the abbreviation and the phrase. As long as QuickCorrect is enabled, the abbreviation will be replaced by the phrase automatically.

➔ For more information on using the QuickCorrect feature, **see** "Adding and Removing QuickCorrect Entries," **p. 132**.

TROUBLESHOOTING

CORRECTLY PASTING BLOCKS OF CELLS

Sometimes when I paste, I get something other than what I wanted. What am I doing wrong?

The Windows Clipboard remembers the last cell or block of cells that you cut or copied. If you are getting the wrong item pasted, it's because you didn't cut or copy correctly. It's no big deal—just undo what you pasted, so you can try again.

Also, you might want to take a look at the Clipbook program. You can save more than one "clip" to a clipboard. Furthermore, you can have multiple clipboards so the number of clips that you can maintain is limited only to your imagination. See "Using the Clipbook Program" in Chapter 13, "Importing Data and Working with Other Programs" for more information.

CLICKING AND DRAGGING ISN'T WORKING

When I try to click and drag a block of cells, I either put it in the wrong place, or the block ends up on top of existing information. Is there another way?

Absolutely. Clicking and dragging a block of cells through a spreadsheet can be tricky. Rather than using the mouse to click and drag, try using the menu commands or clicking the toolbar buttons instead. After you select the block of cells, either click the Cut (or Copy) button, or choose Edit, Cut (or Edit, Copy). Now, click in the first cell where you want to insert the block of cells. Either click the Paste button, or choose Edit, Paste.

CELL ADDRESSES ARE INCORRECT

I generated a table with all of the cell names and cell addresses in my spreadsheet. Some of the cell addresses are incorrect. What's going on?

When you generate a table of cell names and addresses, the table will not be updated as you edit the spreadsheet. You will need to make the necessary changes to keep the information current. You can either delete the table and re-create it, or you can make the changes manually by typing in the new cell names or cell addresses.

FIND AND REPLACE ISN'T WORKING

I am trying to search for a label in my spreadsheet. I know the label is in the spreadsheet, but for some reason Quattro Pro isn't finding it. Am I doing something wrong?

Be sure that you double-check the cell address(es) in the Cell text box. If there is a single cell address showing, Quattro Pro will only search that one cell. If there is a cell address range given, perhaps the search text is outside of that range. Use the Range Picker tool to redefine the block of cells that you want to search. Try the search again.

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CHAPTER 24

FORMATTING SPREADSHEETS

In this chapter

by Laura Acklen

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INSERTING, CLEARING, AND DELETING CELLS, ROWS, AND COLUMNS

Spreadsheets, like documents, are constantly evolving. As you work on your spreadsheets, there will be situations where you need to add a few rows or columns. A common situation is to start typing column headings in the first row of a spreadsheet, and after you've typed in all the information, you realize that you didn't leave enough room for a title. No problem—you can insert as many rows as you need right on top. The same thing goes for columns. If, after entering a lot of data, you realize that you need to add a column between two columns full of data, again, no problem.

The same thing is true for clearing the contents of cells or deleting the cells themselves. When you don't need the information anymore, you can get rid of it quickly.

INSERTING ROWS AND COLUMNS

When you insert new rows and columns in Quattro Pro, the existing data is shifted down or to the right of the spreadsheet to make room. If you are planning to move or copy a block of cells, it's a good idea to make room for it first. You can avoid accidentally replacing existing information if you are sure you have enough empty cells for the block.

The nice thing is that you don't have to worry about re-creating your formulas when you add (or remove) rows and columns. Quattro Pro automatically adjusts formulas (and cell names) to account for the added space. For example, let's say that you have a `SUM` formula at the bottom of a column that sums rows 2–13. You add three rows to the notebook. Quattro Pro adjusts the formula to include rows 2–16.

To insert rows or columns

1. Select the number of rows or columns that you want to insert (see Figure 24.1). For example, if you select three columns, Quattro Pro inserts three columns. Or, if you select five rows, Quattro Pro inserts five rows.

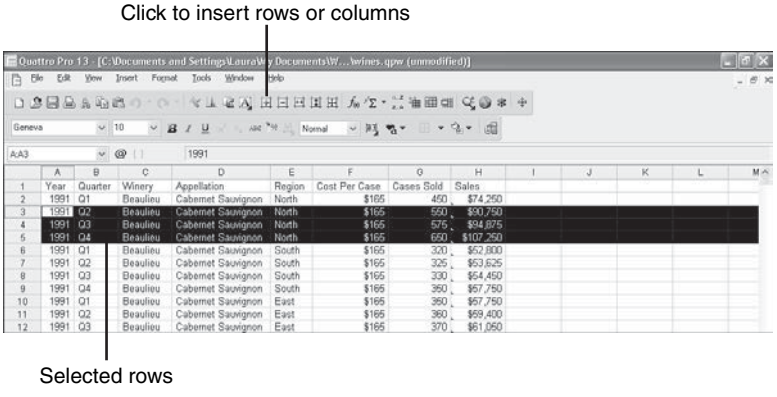


Figure 24.1
You can select the number of rows or columns that you want to insert.

2. Click the Insert Cells, Rows, Columns, or Sheets button. Quattro Pro inserts the new rows on top of the existing rows, so the existing data is moved down (see Figure 24.2). New columns are inserted to the left of the existing columns, so the existing data is moved to the right.

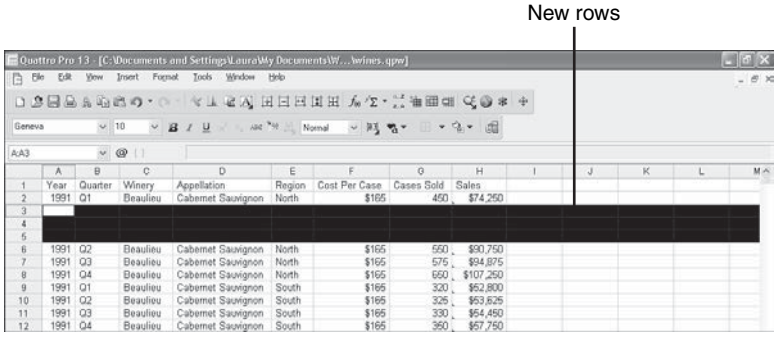


Figure 24.2
The new rows are inserted on top of the selected rows by default.

CAUTION

> If you missed the step to select the number of rows or columns that you want to insert, you will see the Insert Cells dialog box. Choose Cancel to close the dialog box. Select the cells, and then click the Insert Cells, Rows, Columns or Sheets button.

To insert a cell or block of cells

1. Select a cell or click and drag to select a group of cells that define the size of the block you want to insert. For example, if you want to insert three columns and two rows, select the cells in three columns and two rows.
2. Click the Insert Cells, Rows, Columns, or Sheets button to display the Insert Cells dialog box (see Figure 24.3). Select one of the following:
   - **Columns**—To shift to the right
   - **Rows**—To shift down
3. In the Insert Cells dialog box, click Partial; then click OK.

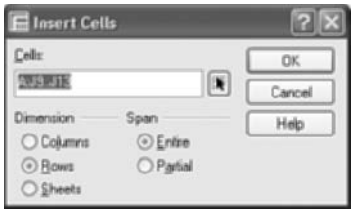


Figure 24.3
Using the Insert Cells dialog box, you can indicate exactly how you want the cells inserted.

If you are getting an error when you try to add columns, see "Unable to Add Columns" in the Troubleshooting section at the end of this chapter.

CLEARING THE CONTENTS

Sometimes it's just faster to start over. If you decide that you want to wipe out the contents (or the formatting) of a cell, row, or column, you can do that without affecting the rest of the data.

To clear the contents of a cell, row, or column

1. Select the cell, row, column, or block of cells.
2. Choose from one of the following options:

   - Right-click the selection and choose Clear to clear both the contents and the formatting.
   - Press Delete to clear just the contents.
   - Choose Edit, Clear, Format to clear just the formatting.

DELETING CELLS, ROWS, AND COLUMNS

If there is too much white space in your spreadsheet, you can delete unnecessary cells, rows, and columns. Deleting a block of cells is not the same thing as clearing their contents. You're deleting the actual space in the spreadsheet, which causes the rows and columns to move up or over to fill the gap.

To delete cells, rows, or columns

1. Select the rows or columns that you want to delete.
2. Click the Delete Cells, Rows, Columns, or Sheets button, or right-click the selection and choose Delete Cells.
3. Make a choice from the following options in the Delete dialog box (see Figure 24.4):

   - **Columns, Rows, or Sheets**—To indicate what to delete
   - **Entire**—To delete the selected rows, columns, or sheets entirely
   - **Partial**—To delete only the selected cells

Figure 24.4
Select exactly what you want to delete in the Delete dialog box.

NOTE

As with adding rows and columns, Quattro Pro will automatically adjust formulas and cell names to accommodate the rows and columns that you delete from the spreadsheet.

If you are getting errors after removing rows or columns, see "Deleting Rows and Columns Causes Errors" in the Troubleshooting section at the end of this chapter.

ADJUSTING COLUMN WIDTH AND ROW HEIGHT

When you create a new spreadsheet, all of the columns are the same width and all of the rows are the same height. While this is a good place to start, you'll want to make adjustments to suit your data.

It often happens that the contents of a cell exceed the size of the cell. In most cases, the width of the column is the problem—you have a long title, for example, and the next column chops it off. To display the full text, you need to expand the column width so that the text fits.

Any changes to column width and row height apply to every cell within that column or row. In either case, you can use the mouse to click and drag a row or column border to adjust the width and height. You also can enter precise measurements in a dialog box. Also, don't forget that you can use Undo if you don't like the results.

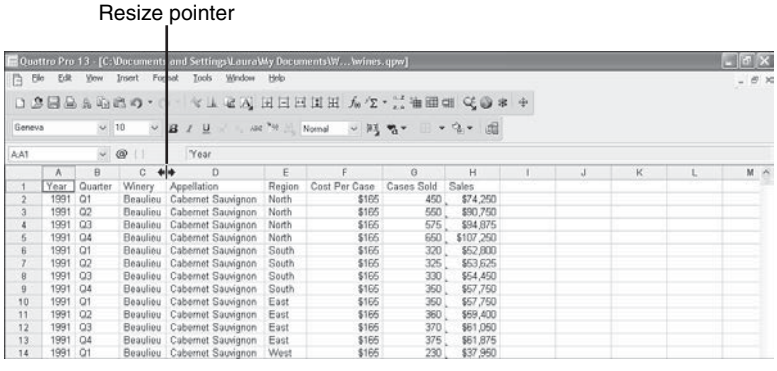
ADJUSTING COLUMN WIDTH

Quattro Pro displays a row of asterisks (*******) if a cell isn't wide enough for the numeric contents. If the cell contains a label, the text sprawls across the cells to the right, unless those cells are full, in which case, the label is cut off. You may recall from an earlier discussion that the label is still there and will reappear when the column is widened.

There are several ways to adjust column width. The quickest way is to use the mouse. The disadvantage of the mouse is that you can't be very precise. If you want to select a specific column width, you can type it into a dialog box. I'll touch on this later.

To adjust the column width using the mouse

1. Position the mouse pointer on the right or left side of a column border (see Figure 24.5). The mouse pointer changes to a thick double-sided arrow.



	A	B	C	D	E	F	G	H
1	Year	Quarter	Winery	Appellation	Region	Cost Per Case	Cases Sold	Sales
2	1991	Q1	Beaulieu	Cabernet Sauvignon	North	$165	450	$74,250
3	1991	Q2	Beaulieu	Cabernet Sauvignon	North	$165	550	$90,750
4	1991	Q3	Beaulieu	Cabernet Sauvignon	North	$165	575	$94,875
5	1991	Q4	Beaulieu	Cabernet Sauvignon	North	$165	650	$107,250
6	1991	Q1	Beaulieu	Cabernet Sauvignon	South	$165	320	$52,800
7	1991	Q2	Beaulieu	Cabernet Sauvignon	South	$165	325	$53,625
8	1991	Q3	Beaulieu	Cabernet Sauvignon	South	$165	330	$54,450
9	1991	Q4	Beaulieu	Cabernet Sauvignon	South	$165	350	$57,750
10	1991	Q1	Beaulieu	Cabernet Sauvignon	East	$165	350	$57,750
11	1991	Q2	Beaulieu	Cabernet Sauvignon	East	$165	360	$59,400
12	1991	Q3	Beaulieu	Cabernet Sauvignon	East	$165	370	$61,050
13	1991	Q4	Beaulieu	Cabernet Sauvignon	East	$165	375	$61,875
14	1991	Q1	Beaulieu	Cabernet Sauvignon	West	$165	230	$37,950

Figure 24.5
Clicking and dragging the column borders is a fast and easy way to adjust the column widths.

2. Click and drag the right column border to the left or right to adjust the column width. Notice that the changes affect the entire column.

If you would rather not click and drag the border to make adjustments, you can adjust the column for the longest entry in just one step. Choose one of the following shortcuts:

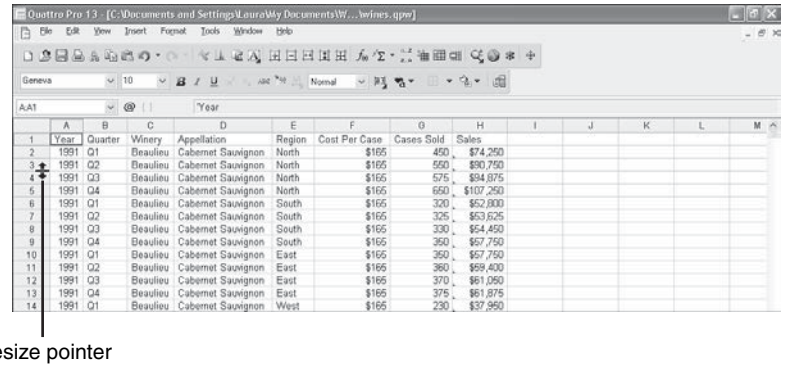
- Double-click the column border.
- Click the Column QuickFit button on the toolbar, or choose Format, QuickFit, Column QuickFit.
- Click the Column/Row QuickFit button, or choose Format, QuickFit, Column/Row QuickFit to adjust the row height and the column width at the same time.

ADJUSTING ROW HEIGHT

Adjusting the row height works exactly the same as adjusting the column width—you just click and drag the row border instead. Here again, you have some shortcuts if you would rather not click and drag.

To adjust the row height using the mouse

1. Position the cursor on the bottom of a row border (see Figure 24.6). The cursor changes to a thick double-sided arrow.



	A	B	C	D	E	F	G	H
1	Year	Quarter	Winery	Appellation	Region	Cost Per Case	Cases Sold	Sales
2	1991	Q1	Beaulieu	Cabernet Sauvignon	North	$165	450	$74,250
3	1991	Q2	Beaulieu	Cabernet Sauvignon	North	$165	550	$90,750
4	1991	Q3	Beaulieu	Cabernet Sauvignon	North	$165	575	$94,875
5	1991	Q4	Beaulieu	Cabernet Sauvignon	North	$165	650	$107,250
6	1991	Q1	Beaulieu	Cabernet Sauvignon	South	$165	320	$52,800
7	1991	Q2	Beaulieu	Cabernet Sauvignon	South	$165	325	$53,625
8	1991	Q3	Beaulieu	Cabernet Sauvignon	South	$165	330	$54,450
9	1991	Q4	Beaulieu	Cabernet Sauvignon	South	$165	350	$57,750
10	1991	Q1	Beaulieu	Cabernet Sauvignon	East	$165	350	$57,750
11	1991	Q2	Beaulieu	Cabernet Sauvignon	East	$165	360	$59,400
12	1991	Q3	Beaulieu	Cabernet Sauvignon	East	$165	370	$61,050
13	1991	Q4	Beaulieu	Cabernet Sauvignon	East	$165	375	$61,875
14	1991	Q1	Beaulieu	Cabernet Sauvignon	West	$165	230	$37,950

Figure 24.6
Using the mouse to click and drag a row border is the quickest way to adjust the row height.

2. Click and drag the row border up or down to adjust the row height. Notice that the changes affect the entire row.

You can use several great shortcuts for adjusting the row height:

- Double-click the row border.
- Click the Row QuickFit button on the toolbar, or choose Format, QuickFit, Row QuickFit.
- Click the Column/Row QuickFit button, or choose Format, QuickFit, Column/Row QuickFit to adjust the row height and the column width at the same time.

TIP FROM

Laura Acklen

Imagine that you have set up a spreadsheet with specific column widths and row heights and you want to use that arrangement in another sheet. No problem! With Quattro Pro, you can copy the information and when you paste it into another sheet, you'll have the option of selecting matching column widths and row heights. Here's how: After you have copied the information, switch to the new sheet. Now, instead of choosing the plain Paste, choose Edit, Paste Special. In the Paste Special dialog box, enable the Row/Column Sizes check box. Choose Paste.

ASSIGNING PRECISE DIMENSIONS TO COLUMNS AND ROWS

Let's say you are creating a spreadsheet and you need to have three columns that are exactly 1.25" wide. Instead of dragging the column border and trying to guess at the correct width, you can type the specific dimensions in the Active Cells dialog box.

To adjust the column width or row height using specific dimensions

1. Select the column(s) or row(s) to be resized.
2. Click the Selection Properties button, choose Format, Selection Properties, or press F12 to open the Active Cell dialog box.
3. Click the Row/Column tab (see Figure 24.7). Choose from one of the following options:
   - Type the width in the Set Width text box.
   - Type the height in the Set Height text box.
   - Click Reset Width to switch back to the default width.
   - Click Reset Height to switch back to the default height.
4. Click OK when you're finished.

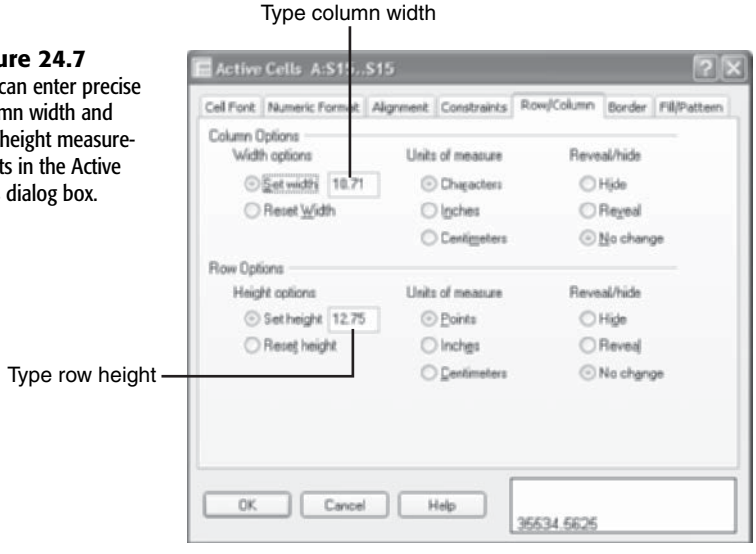


Figure 24.7
You can enter precise column width and row height measurements in the Active Cells dialog box.

FORMATTING CELLS

Reading through rows and columns of data can be mind-numbing. You can help make it easier to interpret the data by taking a few minutes to apply some formatting, including simple steps such as applying a specific format to the numbers, adding bold or shading to column headings, aligning information, and joining cells. Once you've established the appearance, you can use QuickFormat to copy the formatting to other sections of the spreadsheet.

ASSIGNING A FORMAT TO VALUES

One of the first things you can do is to apply formatting to the values. This not only improves the appearance, but it saves time. When you enter in the values, you can just enter raw numbers and format them later.

By default, the values that you enter are displayed in a General numeric format, which displays the numbers as you have entered them. There are many other types of formats, such as Currency, Percent, Scientific, and Date.

To set the format for values

1. Select the cell(s) that you want to format.
2. Click the Selection Properties button, or choose Format, Selection Properties to open the Active Cells dialog box.
3. Click the Numeric Format tab to display a list of formats.
4. Select a format from the list. The sample box shows you what that format will look like (see Figure 24.8).

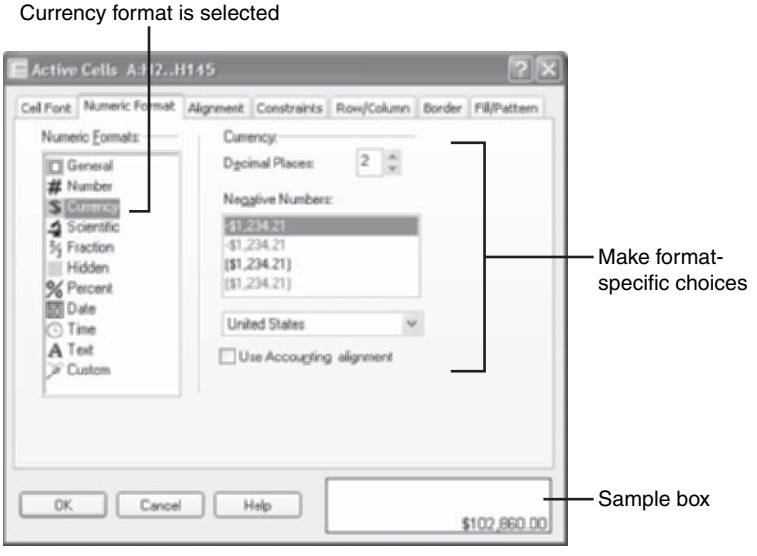


Figure 24.8
In the Numeric Format tab, select one of the many ways to display the values in your spreadsheet.

NOTE

> Depending on the numeric format that you choose, additional options will become available. For example, if you choose Number, you will have an opportunity to choose how many decimal places you want displayed, how you want to display negative numbers, and whether you want to use a thousands separator.

5. Click OK when you're finished.

If you are seeing asterisks in cells after changing the numeric format, see "Changing the Numeric Formatting Causes Errors" in the Troubleshooting section at the end of this chapter.

If the Short Date Intl and Long Date Intl formats aren't what you need, see "Incorrect Long Date Intl and Short Date Intl Formats" in the Troubleshooting section at the end of this chapter.

ALIGNING ENTRIES IN CELLS

Aligning text in the cells also helps. For example, centering the labels in the columns, aligning row labels on the left, and aligning the values on the right helps differentiate the data and make it easier to read.

By default, Quattro Pro aligns labels on the left and values on the right side of a cell. You can also center text in a cell or across selected cells, rotate text for column headings, display the text vertically, and more.

To align text in a cell

1. Select the cell(s) that you want to align.
2. Click the Selection Properties button, or choose Format, Selection Properties to open the Active Cell dialog box.
3. Click the Alignment tab to display the alignment options (see Figure 24.9).

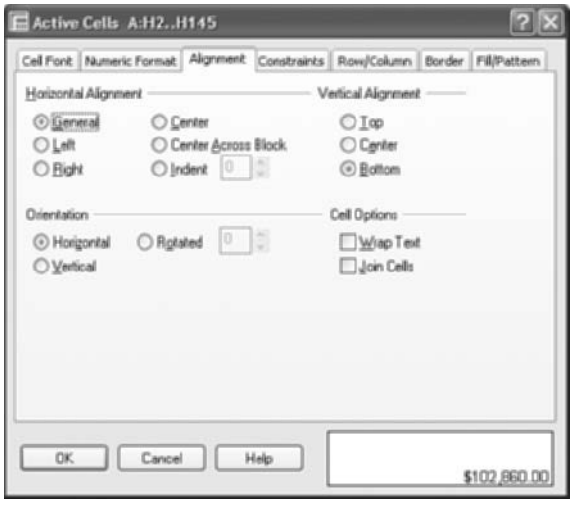


Figure 24.9
The Alignment tab has options for horizontal alignment, vertical alignment, and orientation.

4. Choose from the following options. The sample box shows you how the text will look with the selected setting:
   - **Left/Center/Right**—Aligns text horizontally in the cell.
   - **Center Across Block**—Centers text in the left cell across the selected cells.
   - **Indent**—Indents the text away from the edge of the cell.
   - **Top/Center/Bottom**—Aligns text vertically in the cell.
   - **Horizontal**—Displays text horizontally in a cell.
   - **Vertical**—Stacks the text vertically in the cell.
   - **Rotated**—Turns the text by degrees (–180° to 180°).
5. Click OK when you're finished.

There is also a button on the toolbar that you can use to quickly align text in a cell. Click the Change the Horizontal Alignment of Text in the Selected Cells button; then choose one of the four alignment options. If you hover over the Alignment button, a QuickTip appears with details.

USING FONT ATTRIBUTES IN CELLS

Text in a Quattro Pro spreadsheet can be formatted using the same techniques that you learned in WordPerfect. Bold, italic, underline, strikethrough, and superscript/subscript can be applied to selected cells by clicking the button on the toolbar. Another font, or font size, and text color can be applied by selecting from the property bar (see Figure 24.10).

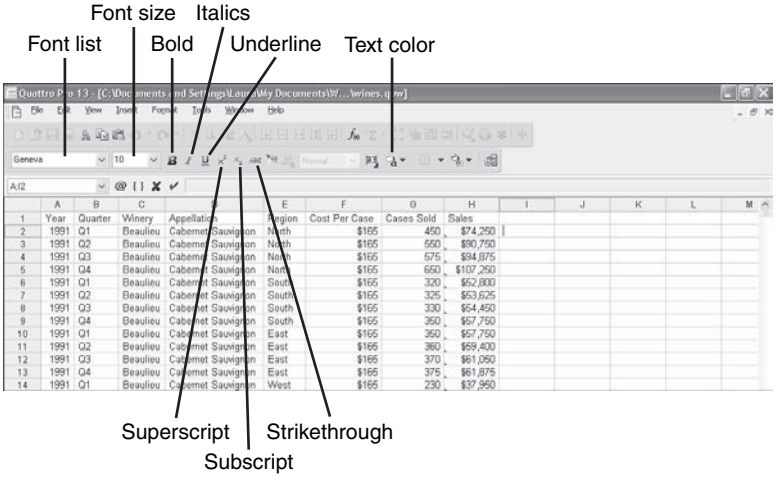


Figure 24.10
You format text in Quattro Pro using the same techniques as in WordPerfect.

All of these items plus the accounting style total line can be chosen from the Active Cells dialog box. If you prefer to apply everything all at once, open the Active Cells dialog box and make your selections there.

To make changes in the Active Cells dialog box

1. Select the text, a cell, or group of cells.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Cell Font tab to display the font options (see Figure 24.11).

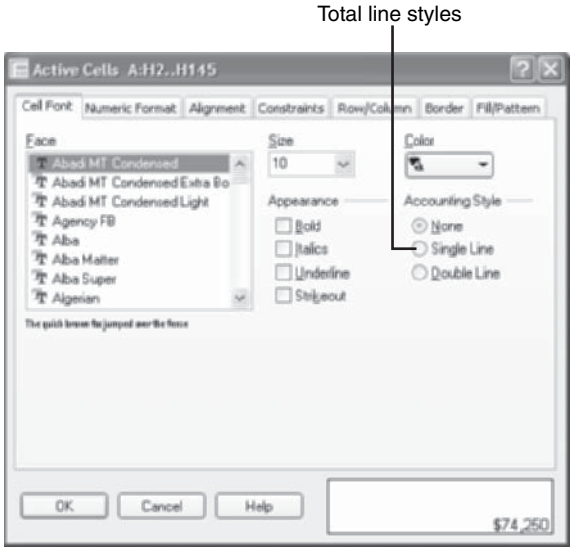


Figure 24.11
The Cell Font tab of the Active Cells dialog box looks a lot like the Font dialog box in WordPerfect.

ADDING BORDERS AROUND CELLS

Borders and shading can be used to add a professional touch to your spreadsheets. Borders are lines around a cell or block of cells. Borders are most often used to delineate a group of cells so you can quickly discern how a group of cells are related.

To add a border around a cell or group of cells

1. Select the cell or group of cells.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Border tab to display the border options (see Figure 24.12).
4. Open the Type picker, and then click a border type from the palette.
5. (Optional) Open the Color picker, and then choose a color from the palette.
6. Choose from the following options:
   - **All**—Applies the borders to all of the grid lines of the cells.
   - **Outline**—Applies the borders only to the exterior lines of the cells.
   - **Inside**—Applies the borders only to the interior lines of the cells.
   - **Verticals**—Applies the borders only to the vertical lines of the cells.
   - **Horizontals**—Applies the borders only to the horizontal lines of the cells.
7. Choose OK when you are finished.

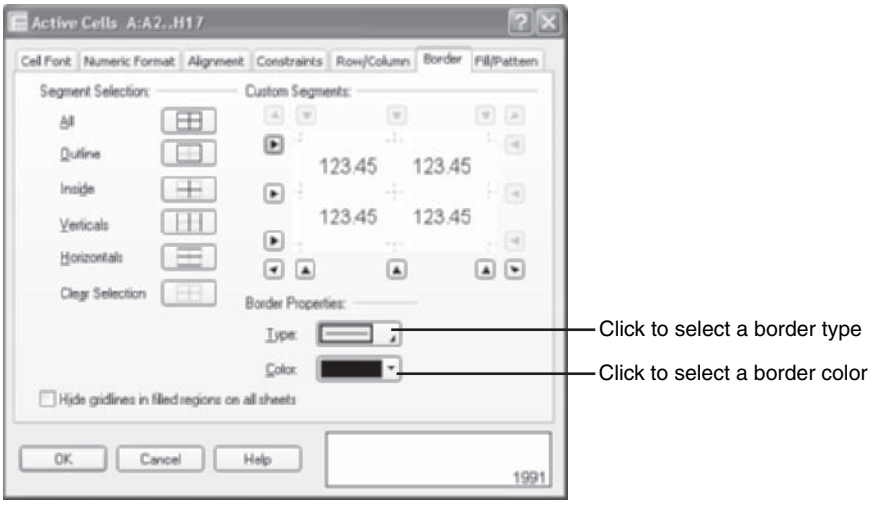


Figure 24.12
Use the Border options in the Active Cells dialog box to create a border around cells.

NOTE

> If you prefer, you can use the Custom Segments section to click the areas where you want to apply the borders. Either click the arrows, or inside the sample grid to apply borders. Clicking the Clear Selections button will remove the border assignments so you can start over.

You can always go back and remove borders when they are no longer necessary. This step is also necessary if you decide to redefine the border area.

To remove borders from cells

1. Select the cell or group of cells.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Border tab.
4. Click the All button in the Segment Selection section.
5. Open the Type picker and choose No Line (a single line with a large X through it).
6. Choose OK.

ADDING SHADING TO CELLS

Shading is most often used to emphasize important cells, such as column headings or totals. To add shading to a cell (or block of cells), you select a fill pattern and a fill color. If the cells you are shading contain data, choose a light color; otherwise, the information will be hard to read.

To apply shading around a cell or group of cells

1. Select the cell or group of cells.
2. Click the Selection Properties button, or choose Format, Selection Properties.

3. Click the Fill/Pattern tab to display the fill and pattern options (see Figure 24.13).

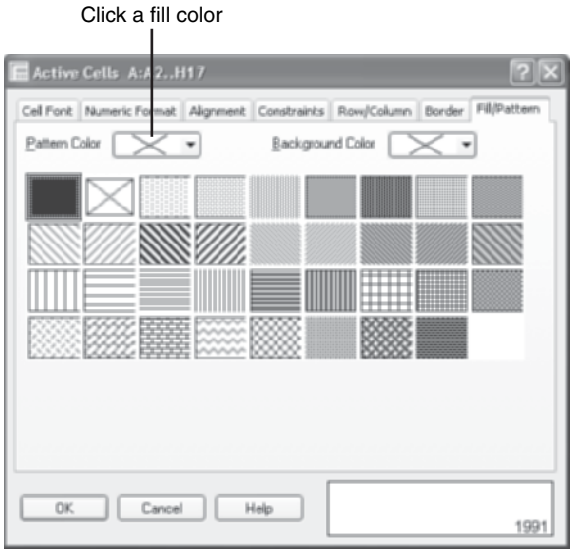


Figure 24.13
The Pattern Color picker opens a palette of colors that you can use for shading.

4. Open the Pattern Color picker and choose a color for the shading.
5. Choose OK.

CAUTION

Not all printers are capable of printing text on a shaded background. Consult your printing manual for more information on whether or not your particular printer supports this option.

TIP FROM

Consider using shading to draw attention to cells that must be filled in. You could also use shading to mark cells that should not be altered, because if changes are made, you would notice them immediately.

PROTECTING CELLS

When you lock, or *protect*, a cell or spreadsheet, you are preventing editing, replacement, or deletion of data. Columns and rows that contain protected cells cannot be deleted until you remove the protection.

You can protect data in a spreadsheet in a number of ways. If you want to make sure that the data is secure, you can protect an entire spreadsheet. You also can lock a specific cell or group of cells. If you choose to protect an entire spreadsheet, you can go back and selectively unprotect cells.

To protect the entire spreadsheet

1. Choose Format, Sheet Properties and click the Protection tab.
2. Click the Enable Cell Locking check box.

To unlock a cell in a protected spreadsheet

1. Select a cell.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Constraints tab to display the Constraints options (see Figure 24.14) .

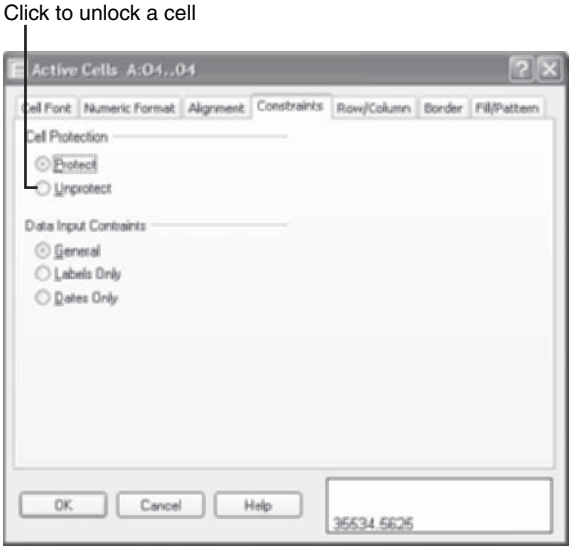


Figure 24.14
Use the Data Input Constraints options to limit the type of data that can be entered in a cell.

4. Enable the Unprotect option.

To selectively lock a cell or group of cells

1. Select the cell(s) that you want to protect.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Constraints tab.
4. Enable the Protect option.

NOTE

You can also constrain the types of entries allowed in a cell or selected cells. Choose Format, Selection Properties. Click the Constraints tab and then choose Labels Only or Dates Only. The General option removes the constraints and accepts all entries.

JOINING CELLS

A series of cells can be joined to create one big cell. This is usually done for a long title, but other situations also might call for joined cells. Remember, you can join cells horizontally or vertically, so you could have a vertically aligned label alongside several rows.

You can join cells in rows, in columns, or in both rows and columns. Data in a joined cell can be used in calculations just like any other cell. The same goes for aligning and formatting—you can format a joined cell just as you would a single cell.

To join cells

1. Select the cells that you want to join.
2. Click the Selection Properties button, or choose Format, Selection Properties.
3. Click the Alignment tab to display those options (refer back to Figure 24.9).
4. Enable the Join Cells option. Quattro Pro joins the selected cells into one big cell (see Figure 24.15).

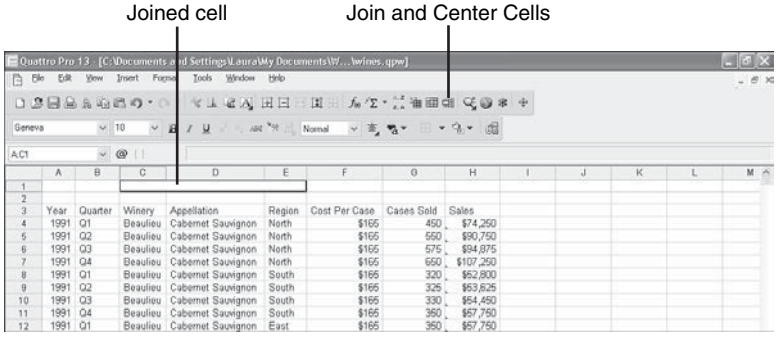
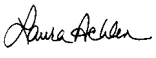


Figure 24.15
A joined cell can be used in calculations and can be formatted just like you would any single cell.

TIP FROM



The Join Cells button on the toolbar joins cells and centers the text—all at the same time.

COPYING CELL FORMATTING

As you polish a spreadsheet's format and make decisions about how you want something to look, keep in mind that once you have decided on a format, you can copy that formatting to other cells. That means you play around with one cell until you get it *just right* and then copy those format settings. You don't have to duplicate the same steps over and over to format different sections of a spreadsheet.

If you've ever used the QuickFormat feature in WordPerfect, this will seem like a review because the feature works essentially the same in Quattro Pro.

To copy cell formatting

1. Select the cell (or block of cells) with the format that you want to copy.
2. Click the QuickFormat button on the toolbar.
3. Select the cell(s) where you want to copy the formatting.

Now that you have copied the format, you have a choice. You continue copying that format to other cells, or you can turn QuickFormat off and work on something else. To continue copying the formatting, click the next cell (or block of cells). You can continue copying the original formatting until you turn off QuickFormat. To turn off QuickFormat, click the QuickFormat button.

CAUTION

Take care that you do *not* select the text within a cell. If you do, the QuickFormat button will not be available. Click elsewhere in the spreadsheet; then click back on the cell that contains the formatting.

TIP FROM

The QuickFormat feature can be used to quickly join cells. For example, you have a heading that appears every 15 rows. The heading is in a series of three cells that were joined together. After you've joined the three cells and formatted the original heading, you can use the QuickFormat feature to join the next set of three cells, and insert the heading into the joined cell. Just make sure you click in the first cell of the three that you want to join. If you forget, and end up joining the wrong series of cells, click Undo and try again.

➔ For more information on using QuickFormat, **see** "Using QuickFormat to Create Styles On-the-Fly," **p. 225**.

The QuickFormat feature is designed to copy formatting that has been applied to the cell, not for formatting that has been applied to the text. Furthermore, if you use QuickFormat to copy formatting to a cell that has formatting assigned to the *text*, QuickFormat will not replace that formatting. To rephrase, as long as you are applying formatting to the entire cell, QuickFormat is a handy way to transfer that formatting to other cells.

SIMPLIFYING SPREADSHEET NAVIGATION

Most spreadsheets are too big to fit on one screen, which means you have to scroll back and forth quite a bit. There are several steps you can take to simplify the process. First, you can create your hard page breaks and break the spreadsheet up into multiple pages. You can also lock the rows and columns that act as headings so you can still read the column headings and row labels as you scroll back and forth through the spreadsheet. Finally, you can choose to hide certain rows and columns so they are not displayed.

INSERTING PAGE BREAKS

Quattro Pro automatically creates page breaks at the bottom of each page, according to the page size. In other words, if you are printing on 8-1/2" × 11" paper, you'll have fewer rows on a page than if you were printing on 8-1/2" × 14" paper. The page breaks that Quattro Pro creates are called "soft" page breaks.

You can insert your own page breaks if you prefer to separate information in a certain way. The page breaks that you insert are called "hard" page breaks. Both horizontal and vertical page breaks can be inserted to start a new page. These hard page breaks can be deleted if you change your mind. You cannot, however, delete Quattro Pro's soft page breaks.

To insert a page break

1. Click the cell where you want the page break to appear (the page break will appear before the cell).
2. Choose Insert, Page Break, Create to display the Insert Page Break dialog box (see Figure 24.16).
3. Open the Break Type drop-down list and choose a page break type.
4. Choose OK.

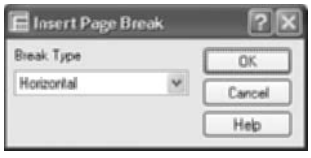


Figure 24.16
Use the Insert Page Break dialog box to insert a horizontal or vertical page break.

CAUTION

If the active cell is anywhere in the first column or the first row, a page break is automatically created: a vertical break if the active cell is in the first row, or a horizontal break if the active cell is in the first column. If the active cell is the first cell in the spreadsheet (A1), the Page Break option is not available.

TIP FROM

You can quickly create a horizontal page break by selecting a row and choosing Insert, Page Break, Create. The page break will appear above the selected row.

In Draft view, page breaks appears as black lines that are slightly thicker than the cell borders. They can be difficult to see. There is a view option that improves the appearance of page breaks and makes them easier to see.

To view page breaks, choose View, Page Breaks to display page breaks as thick blue lines (see Figure 24.17). To switch back to the previous view, choose View, Draft View or View, Page (depending on what you had selected originally).

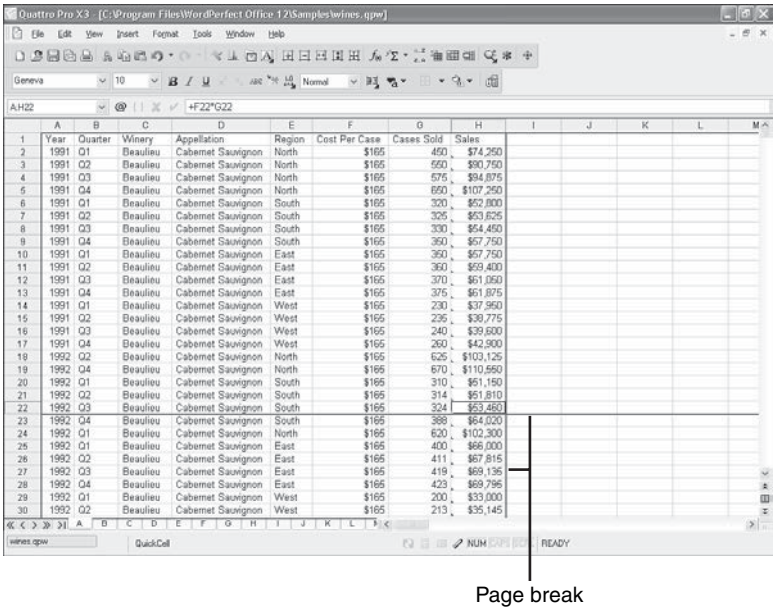


Figure 24.17
There is a view mode that changes page breaks into solid blue lines, making them easier to see onscreen.

To delete a page break

1. Click below a horizontal page break, or click to the right of a vertical page break.
2. Choose Insert, Page Break, Delete. (Choose Delete All to delete all of the page breaks at once.)

LOCKING TITLE ROWS AND COLUMNS

Even though you can break up your data into multiple sheets, most spreadsheets are too large to fit everything on one screen. The problem is, once you start scrolling down and over, you tend to forget what the cells represent. You can prevent the titles (both in columns and in rows) from scrolling off the screen by locking them into place. Once you've done this, you can scroll down (and over) without losing sight of the titles.

The Locked Titles option is only available in the Draft view, so the first step is to switch to that view mode. Choose View, Draft View.

To lock horizontal titles (column headings), click in the row below the last row you want displayed. For example, if you have two rows of columns headings, click in the third row. Choose View, Locked Titles.

To lock vertical titles (row titles), click in the column to the right of the last column you want locked. For example, if you have two columns of row titles, click in the third column. Choose View, Locked Titles.

To lock both horizontal and vertical titles, click in the row just below and the column just right of the intersection of the rows and columns you want to lock. Choose View, Locked Titles. The locked area has blue guidelines around it and you can now scroll down and over without losing sight of the titles (see Figure 24.18).

It almost goes without saying, but to remove the locked titles, choose View, Locked Titles.

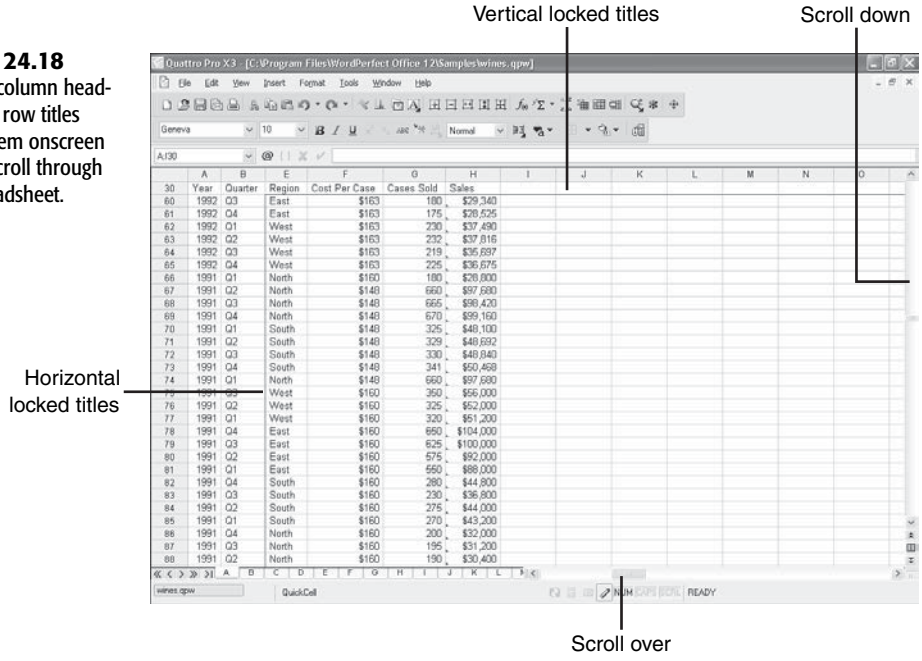


Figure 24.18
Locking column headings and row titles keeps them onscreen as you scroll through the spreadsheet.

HIDING COLUMNS AND ROWS

Let's say you have created a spreadsheet that will be distributed to your co-workers. Some of the information is sensitive and you would rather that the recipients not be able to view it. No problem. In Quattro Pro, you can hide rows or columns from view. They won't be printed either, so the information stays secure.

To hide a row or column

1. Select the row(s) or column(s) that you want to hide.
2. Right-click the selection and choose Hide.

When you hide a row, the remaining rows move up to take up the space. The same happens with columns. When you hide columns, the remaining columns move over to the left to fill the space. While the hidden rows and columns are no longer visible, the row numbers and column letters do not change. For example, if you hide column C, the columns onscreen are labeled A, B, D, E, and so on. Therefore, there is a subtle visual clue that you have hidden rows and columns.

To reveal hidden rows or columns

1. Choose Edit, Select All.
2. Click the Selection Properties button or choose Format, Selection Properties (or press F12).
3. Click the Row/Column tab.
4. Enable the Reveal option in the Reveal/Hide section of the Column Options or the Row Options area.
5. Choose OK.

TIP FROM

If you have multiple sheets in your notebook, you might like this feature. Just as you can use color-coded file folder tabs to help keep them organized, so can you color code the sheet tabs. Assigning a specific color to certain sheets can make it easier to navigate through them. For example, you might assign green to expense sheets, blue to income sheets, and so on. The first step is to right-click the sheet tab. Choose Sheet Properties, and then click the Tab Color tab. If necessary, deselect the Use System Colors check box. Click the drop-down list arrow to open a palette of colors. Click the color you want, and then choose OK.

USING SPEEDFORMAT

As you have seen, you can use a variety of different formatting options to emphasize cells. A simple application of bold or italic might be enough. Or, you might decide to use a text color or a fill color to color the background of the cell. Surrounding a group of cells with a thick border helps draw your attention to important sections of a spreadsheet.

Take my word for it—before you try to do all these things manually, you need to look at the SpeedFormat feature. There are plenty of different styles to choose from, and you can format an entire table in just seconds.

To use SpeedFormat on your spreadsheet

1. Click the SpeedFormat button, or choose Format, SpeedFormat (or press Ctrl+Shift+F) to display the SpeedFormat dialog box (see Figure 24.19).
2. Select one of the formats in the Formats list box. The Example box shows how your spreadsheet will look if you apply that format to it.
3. If necessary, remove the check marks from the options that you don't want to apply formatting to. For example, you could skip the text color or shading.
4. Click OK to apply the selected SpeedFormat to the spreadsheet.

NOTE

You can revise the predefined formats in the SpeedFormat dialog box. Simply disable any of the check boxes in the Include section for properties that you do not want applied to the cells.

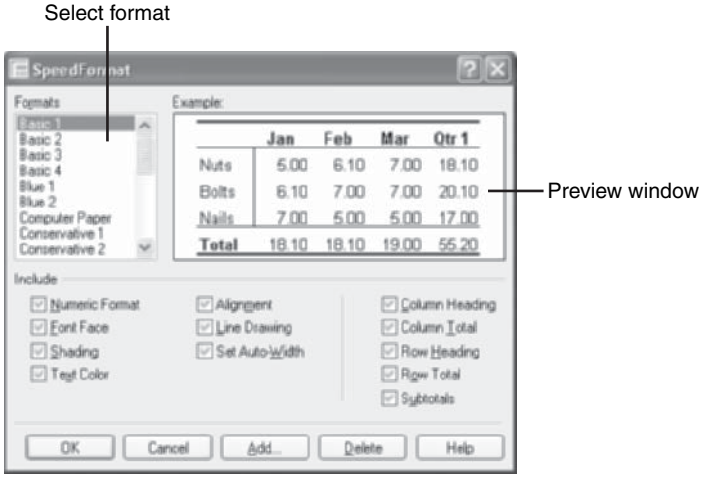


Figure 24.19
You can quickly turn a plain-Jane spreadsheet into a presentation-quality spreadsheet with one of the predefined SpeedFormats.

You can add one of your formats to the list of predefined formats in the SpeedFormat dialog box so you can get to it quickly and apply it to other spreadsheets.

To add a format to the SpeedFormat list

1. Click the SpeedFormat button on the toolbar, or choose Format, SpeedFormat to display the SpeedFormat dialog box (refer back to Figure 24.19).
2. Choose Add to display the Format Name dialog box (see Figure 24.20).
3. Type the name of the new format in the Format Name text box.
4. Use the Range Picker to switch back to the spreadsheet so you can select the cells that contain the formatting you want to use.
5. Click the Maximize button in the Format Name title bar to restore the dialog box.
6. Choose OK.

Figure 24.20
Take advantage of the formatting that you've already done to create new SpeedFormat definitions.

CREATING STYLES

As you might expect, styles in notebooks are used in much the same way as styles in documents. Rather than taking the same series of steps to format information, you can create a style with all of the format settings and then apply the style to cells in the notebook.

DEFINING A NEW STYLE

There are several advantages to styles. First, you can make adjustments to the style and have those changes be automatically reflected in the notebook. Second, styles ensure consistency of appearance across notebooks. Once you have created the styles, they can be used over and over again. Third, applying a style is much faster than opening dialog boxes and making multiple selections.

To create a new style

1. Choose Format, Define Styles to open the Styles dialog box (see Figure 24.21).

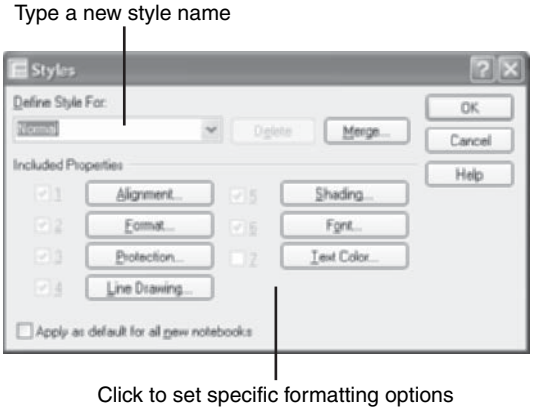


Figure 24.21
Quattro Pro styles can contain a wide variety of formatting options.

2. Type a name for the style in the Define Style For text box. Notice that after you type a style name, the check boxes become available.
3. Click any of the following buttons to open dialog boxes where you can select formatting options:
   - **Alignment**—Contains settings for horizontal and vertical alignment as well as orientation (portrait/landscape) and rotated text.
   - **Format**—Contains numeric formats to choose from.
   - **Protection**—Contains protect or unprotect options.
   - **Line drawing**—Contains settings for lines around cells, border type, and border color.
   - **Shading**—Contains options for pattern color, background color, and pattern types.
   - **Font**—Contains a list of fonts, font sizes, and the bold, italic, underline, and strikeout attributes.
   - **Text color**—Contains a palette from which you can select a text color.
4. Choose OK when you are finished.

APPLYING STYLES TO CELLS

After you've created the styles, you can use them to format cells in the notebook. Notice that they are available to you no matter which sheet you are working on.

To apply a style

1. Select a cell or block of cells.
2. Open the Style drop-down list from the property bar (see Figure 24.22).
3. Choose a style from the list.

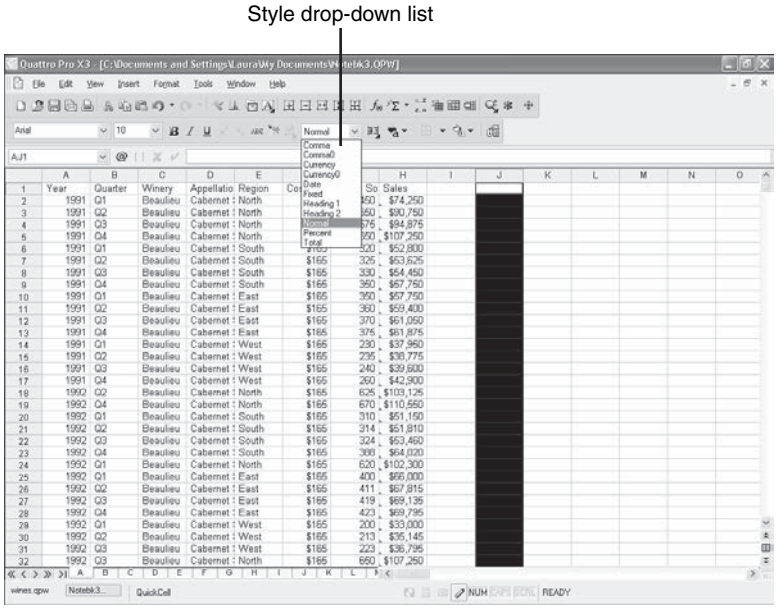


Figure 24.22
The fastest way to select a style is to choose one from the Styles drop-down list on the property bar.

COPYING SETTINGS BETWEEN STYLES

When you create your styles, you may find that they are very similar, with only minor differences. Rather than duplicate the steps to create each style, create one style and then use that as a basis for the rest. All you have to do is merge the settings into the new style.

To copy settings between styles

1. Choose Format, Define Styles to open the Styles dialog box.
2. Type a name for the style, or pick one from the list, in the Define Style For text box. This is the style that will receive the settings that you copy.
3. Click the Merge button to display the Merge Style dialog box (see Figure 24.23) .
4. Select the style that contains the settings you want to copy over in the Select Style drop-down list.
5. Choose OK.

Figure 24.23
Copy formatting from one style to another in the Merge Style dialog box.

TIP FROM

The Merge Style dialog box can also be used to copy style settings from a selected cell into a style. When you select Cell in the Merge Style dialog box, a Select Cell box appears with a Range Picker that you can use to select the cell(s) in the spreadsheet that contain the formatting you want to copy.

24

CHANGING THE DEFAULT SETTINGS IN QUATTRO PRO

You may have noticed that Quattro Pro has a set of default settings for notebooks. You can change those default settings to match the settings that you use most often. The next time you want to "set up" a notebook with your preferred font and font size and any other custom settings, make your selections in the Styles dialog box and then save them as the new default settings.

To change the default settings for the current notebook and all new notebooks

1. Choose Format, Define Styles to open the Styles dialog box.
2. Select the Normal style from the list.
3. Make your selections.
4. Enable the Apply As Default for All New Notebooks check box.
5. Choose OK.

TIP FROM

You can change the default date format by editing the Date style. Choose Format, Define Styles; then select Date from the drop-down list. Click the Format button; then select a new date format. Choose OK, OK.

TROUBLESHOOTING

DELETING ROWS AND COLUMNS CAUSES ERRORS

I deleted a column and several rows from my spreadsheet. Suddenly, I've got ERR displayed instead of the results for a formula. What happened?

Quattro Pro is pretty good about adjusting the cell addresses in a cell name when part of the block changes. This system fails if you delete a row, column, or sheet that contains one of the block borders. The coordinates that are attached to the cell name are changed so the block becomes "undefined." The formulas that reference that cell name will return an error.

You'll need to redefine the cell name for that block of cells. Choose Insert, Name, Name Cells to open the Cell Names dialog box. Choose an entry from the Name list. Either type the new cell address(es) in the Cell(s) text box or use the Range Picker to switch back to the spreadsheet where you can click a cell (or select a block of cells). Choose Add; then choose Close.

CHANGING THE NUMERIC FORMATTING CAUSES ERRORS

I made some changes to the numeric formatting in several columns and now I'm seeing asterisks in some of the cells. What did I do wrong?

If you apply a numeric format to a cell (or group of cells), the column width must be wide enough to accommodate the data in that new format. If the column width is inadequate, asterisks are shown in the cell. The fix is easy—just increase the column width. Click and drag the column border until the asterisks disappear and the values show up in their place.

INCORRECT LONG DATE INTL AND SHORT DATE INTL FORMATS

My office needs to use the same format for the Long and Short Date Intl choices. Some of our users are seeing 3/28/06 and others are seeing March 28, 2006. How can I make sure these settings are the same for all of my users?

The look of the Long Date Intl and Short Date Intl choices are determined by settings in both Quattro Pro and Windows. In Quattro Pro, choose Tools, Settings, International, Date Format. Verify that the Operating System Default option is selected, and then go into Windows Control Panel. Choose Regional Settings (or Regional and Language Options). Choose Customize, and then click the Date tab. In the Short Date and Long Date sections, specify your preferred format. Choose OK, OK.

UNABLE TO ADD COLUMNS

I'm trying to add a few columns to my spreadsheet, but I'm getting an error message. Why can't I add additional columns to this spreadsheet?

The default setting in Quattro Pro is to allow for a maximum of 256 columns. You can change this setting to allow for up to 18,000 columns, which is the maximum number of columns allowed. Choose Tools, Settings. Click the Compatibility option (under Application in the Workspace tree). In the Notebook Size section, change the Columns number to the number of columns that you want in this spreadsheet (or higher if you prefer). Choose OK.

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CHAPTER 25

Working with Formulas and Functions

In this chapter

by Laura Acklen

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Creating Formulas

In Chapter 10, "Organizing Information with Tables," you learned how to build formulas that performed calculations within a WordPerfect table. The same principles apply in Quattro Pro. Every calculation is considered a formula, even something as simple as 3+3. To build a formula, you can type any number, or one of the following symbols: -, $, (, @, #, ., %, or =. A formula might contain numbers, cell addresses, cell names, and operators. If a formula starts with a cell address, such as C4*D8, you must put a symbol in front of it or Quattro Pro will treat it like a label.

When you create a formula in a cell, the result of the formula is displayed in the cell, not the formula itself. If you select a cell with a formula, the formula is displayed in the input line where you can edit it. You cannot edit the result of a formula—you can only edit the formula itself.

Most calculations are relatively simple and only involve a couple of operators. However, when your calculations involve more than two operators, such as A13*D15/C4*.075, you need to take a look at the "order of operations." Understanding the order of operations is essential for the calculations to be performed the way you want them to be. The use of parentheses alters the order of precedence so that you can force calculations to be performed in a certain order.

Understanding Cell References

As you may recall reading in Chapter 22, "Getting Started with Quattro Pro," a cell address is a combination of the row number and column letter, so the cell address A13 would indicate the cell that lies at the intersection of column A and row 13. In many cases, you will want to work with a block of cells, not just a single cell. In this case, it is necessary to specify a cell address range. A range is composed of the top-left cell address and the bottom-right cell address with two periods between them. For example, A13..J43 means you want to use the block of cells between A13 and J43.

When you have multiple sheets in the notebook, you may build formulas using cells from the other sheets. Simply reference the sheet name in the cell address. For example, the cell address "C:A13" would be the cell in sheet C at the intersection of row 13 and column A (see Figure 25.1).

These types of cell addresses are defined as "relative" addresses. They are called relative because Quattro Pro has the ability to update formulas and cell names whenever the structure of the spreadsheet changes. What a lifesaver that is! With one exception: In some situations, you want Quattro Pro to use a specific cell in a formula, no matter what happens to the spreadsheet. You can set this up as well—it is called an absolute address.

You can set an absolute cell address by typing a dollar sign before the part of the cell address that you want to make absolute. In other words, you can make the row number absolute, the column letter absolute, or both. Here are a few examples to illustrate:

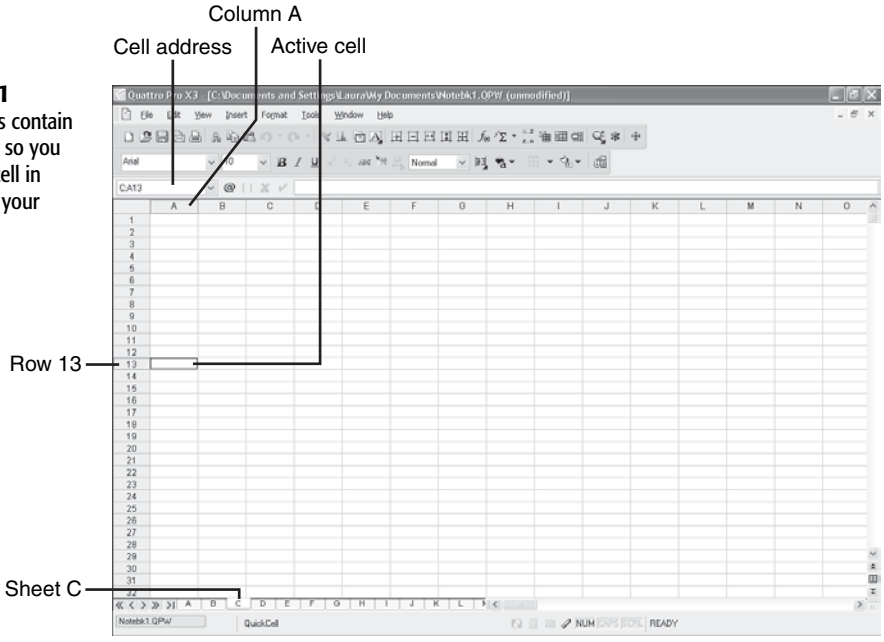

Figure 25.1
Cell addresses contain a sheet name so you can use any cell in any sheets in your calculations.

- **A1**—Makes both the row number and column letter absolute
- **$A1**—Makes the column letter absolute, but allows the row number to change
- **A$1**—Makes the row number absolute, but allows the column letter to change
- **$A:A$1**—Locks the cell address in sheet A, row 1, but allows the column letter to change

UNDERSTANDING THE ORDER OF OPERATIONS

A formula uses mathematical operators to perform calculations on values. There are operators for addition, subtraction, multiplication, division, and exponentiation. Operations are performed according to their order of precedence. To help you remember the correct order, remember the phrase "My Dear Aunt Sally," which stands for multiplication, division, addition, subtraction.

To put it another way, if you build a formula such as D3*4-A7/12+9, the problem will be calculated in the following order:

1. Contents of cell D3 multiplied by 4.
2. Result of A7 divided by 12.
3. Result of step 2 added to 9.
4. Result of step 3 subtracted from the result of step 1.

If the order of precedence doesn't match the calculation that you need to perform, you can use parentheses to alter the order. Consider the results of the following calculations:

- 5 + 3 * 7 = 26
- (5 + 3) * 7 = 56

In the first example, you would multiply 3 by 7 and then add the results (21) to 5. In the second example, you use parentheses to make sure that 5 is added to 3, and the result is multiplied by 7. The key to having a calculation done exactly the way you want it is to use parentheses. This is a fundamental concept when you work with spreadsheets.

ENTERING FORMULAS

Most of your formulas will contain cell addresses, so you'll be thrilled when you see that you can click a cell to add it to a formula, instead of typing a cell address. This is especially nice when you want to use a range of cells in a calculation. For example, instead of typing A3..A31 to indicate the range of cells between A3 and A31, you can click and drag across cells A3 through A31.

When you create a formula, you must begin with a symbol that tells Quattro Pro you are creating a formula, not typing in a label. Most people use the plus sign (+) to begin a formula, but you can also use any of the following: -, $, (, @, #, ., %, or =. Table 25.1 illustrates how each symbol is interpreted in a formula.

TABLE 25.1 MATHEMATICAL CHARACTERS IN FORMULAS

Character	Result
.	Identifies the following data as a value
+	Identifies the following data as a positive value
-	Identifies the following data as a negative value
()	Identifies the following data as a formula and calculates the information contained within the parentheses first
@	Identifies the following data as a function
#	Identifies the following data as a logical equation
$	Identifies the following data as a currency value
=	Identifies the following data as a value

To create a mathematical formula

1. Click in the cell where you want the result of the formula to appear.
2. Type a plus sign (+).
3. Type the formula.
4. Press Enter to enter the formula and display the results in the selected cell (see Figure 25.2).

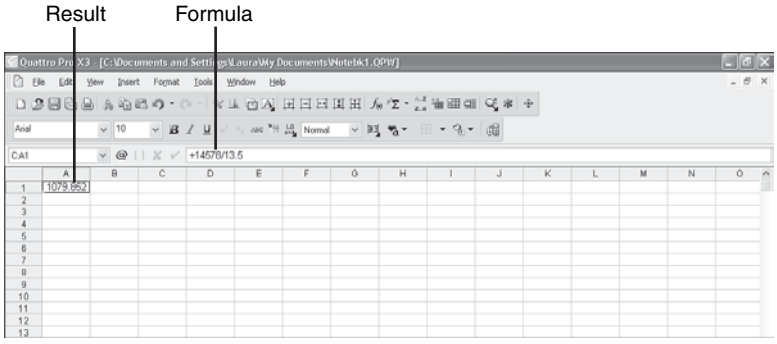

Figure 25.2
When you enter a formula, the results of that formula are displayed in the cell.

To create a formula with a cell address

1. Click in the cell where you want the result of the formula to appear.
2. Type a plus sign (+).
3. Click in the first cell that you want to include in the formula. Quattro Pro inserts the cell address in the formula, as shown in Figure 25.3. (The letter in front of the cell address is the name of the sheet.)

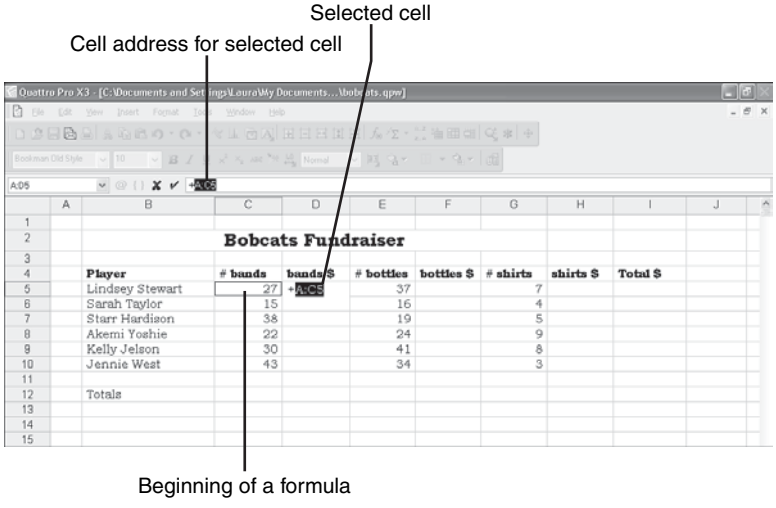

Figure 25.3
Clicking a cell is much easier than figuring out the cell address and typing it in.

4. Click after the cell address (in the formula editing field) and type a mathematical operator.
5. Repeat steps 3 and 4 to continue entering the formula as necessary.
6. Press Enter to add the formula and display the result (see Figure 25.4) .

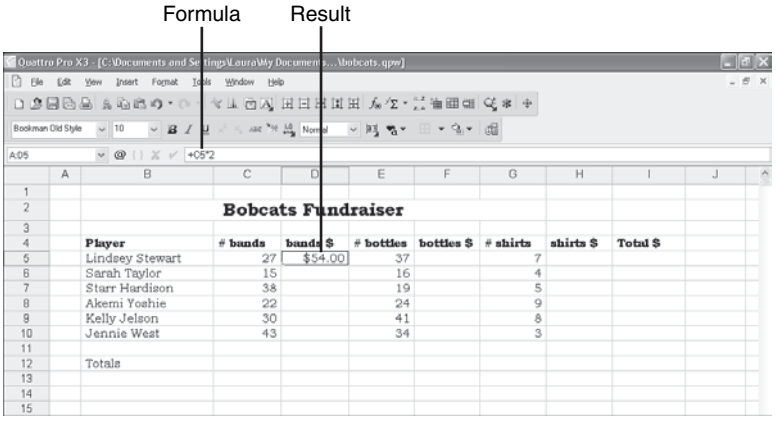

Figure 25.4
The results of the calculation are displayed in the cell. In this case, the bands are $2 each.

TIP FROM

One of the most frequently asked questions is how to calculate elapsed time in a spreadsheet. The following solution can be used for standard time and military time. If you enter the time in standard time format, be sure to include the AM or PM after the time. In cell A3, type the starting time. In cell B3, type the ending time. In the third cell, type **`+(B3-A3)*24*60`**. To explain: B3-A3 calculates the time difference in a fraction of a day, multiplying the result by 24 gives the time difference in hours, and multiplying the result by 60 gives the time difference in minutes.

If you are getting an error or a strange number after entering a date or phone number, see "My Dates Are Turning into Numbers" in the Troubleshooting section at the end of this chapter.

If you are getting an error after you delete a cell name, see "Check Formulas Before Deleting Cell Names" in the Troubleshooting section at the end of this chapter.

EDITING FORMULAS

It seems as though you no sooner create a formula than you have to turn around and revise it. No problem—you can edit a formula as quickly as you can create one, maybe even quicker. For example, if you find that a formula isn't delivering the result you need, you can edit it and change the order of precedence.

To edit the contents of a cell

1. Click in the cell. This opens the cell and places the contents in the input line where you can edit it (see Figure 25.5). You are now in Edit mode.
2. Make the necessary changes.
3. Press Enter to save your changes and switch back to Ready mode.

CAUTION

> If you change your mind about editing a formula, press ESC to cancel the change and revert back to Ready mode. Avoid clicking in another cell as this sometimes results in the cell address being inserted into the formula.

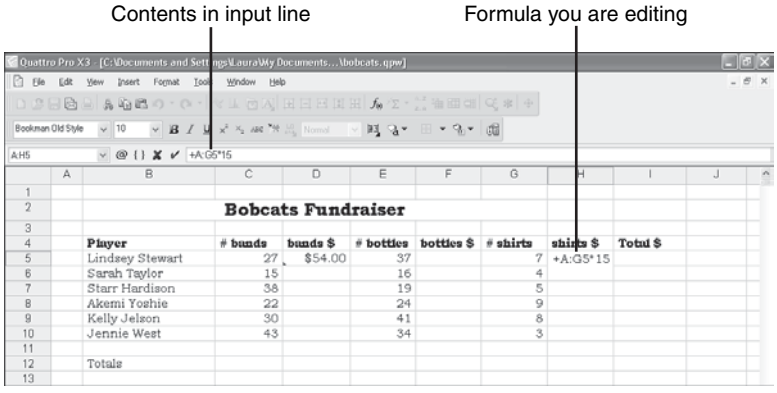

Figure 25.5
Click a cell to place the contents in the input line for editing.

COPYING FORMULAS

In many cases when you create a formula, you need to use it more than once. You might be totaling the contents of a column, and you need to do the same thing for another 10 columns. Rather than re-creating the formula each time, you can copy the first formula across to the other 10 columns. Through the magic of Quattro Pro, the formulas are automatically adjusted for the new cell addresses in each column.

In many cases, the cells that you want to copy the formula to are right next to the formula. But not always. There is a mouse shortcut that you can use if the cells are right next to each other. If they are not, you simply use the Copy and Paste features.

To copy a formula with the mouse shortcut

1. Click in the cell that contains the formula you want to copy.
2. Point to the lower-right corner of the cell and wait for a crosshair pointer to appear. The crosshair pointer has very thin lines with no arrowheads, so don't mistake it for the thicker four-sided arrow.
3. Click and drag across the cells where you want the formula copied (see Figure 25.6).
4. Release the mouse button to copy the formula and calculate the results (see Figure 25.7).

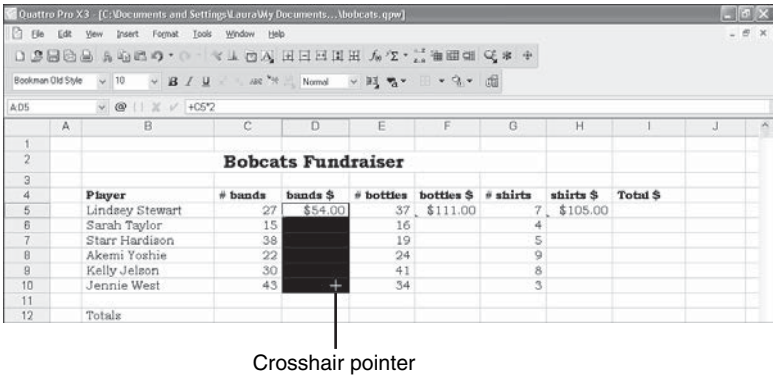

Figure 25.6
Instead of re-creating the same formula over and over, you can copy it to adjacent cells.

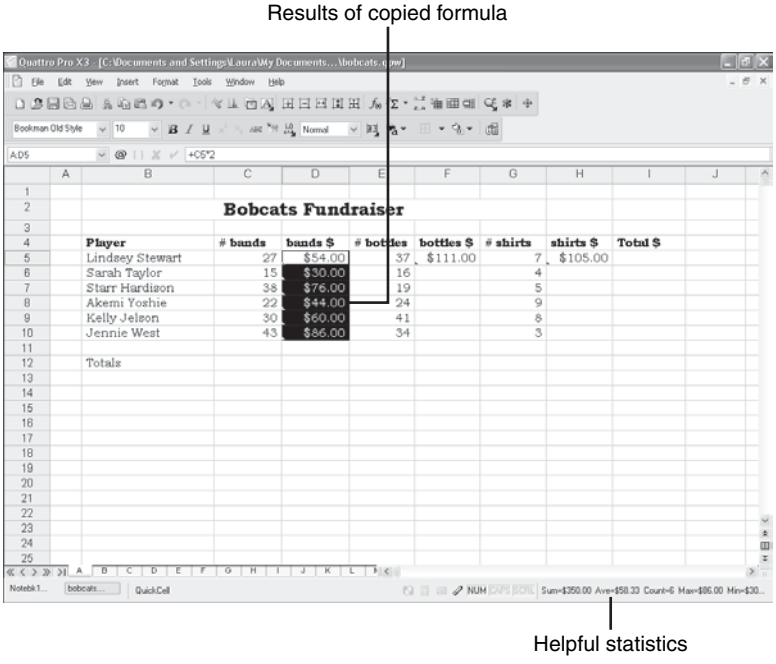

Figure 25.7
When you release the mouse button, the formula is copied to the cells, and the results are calculated.

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TIP FROM

There is also a keyboard shortcut that can be used to copy a formula. Simply select the cell with the formula and all of the cells to which you want it copied (using Shift+arrow keys), then press Ctrl+Shift+L for QuickFill.

Notice that after you selected the cells to copy the formula to, some helpful statistics popped up on the application bar (refer to Figure 25.7). At a glance, you can see the total of the selected cells, the average, the number of cells in the selected range that contain numbers, the biggest number, and the smallest number. Think about this for a minute—you can

calculate statistics on any range of cells in a spreadsheet without having to create the formulas in the spreadsheet.

Select any group of cells, and you get instant statistics—that's pretty cool.

To copy a formula using Copy and Paste

1. Select the formula cell.
2. Click the Copy button, or choose Edit, Copy (or press Ctrl+C).
3. Click in the cell where you want to copy the formula.
4. Click the Paste button, or choose Edit, Paste (or press Ctrl+V).
5. If the Cell Reference Checker dialog box appears, there is a small problem. Choose Close to keep the adjusted formula, or Fix It to use the original formula.

NOTE

> As you may have surmised, you can also move formulas in a spreadsheet. Simply use the cut and paste features to move information in a notebook. There are rules for moving formulas (and referenced cells) in the Help topics. Search for "moving formulas" in the Search tab. Double-click the help topic "Rules for moving formulas and referenced cells."

USING QUICKSUM

The most frequently used function is the SUM function, which adds together the values in the cell range. For example, typing `@sum(C3..C7)` is the same as typing `+C3+C4+C5+C6+C7`. As mentioned earlier, you can click and drag across the cells that you want to add together so that you don't even have to type the cell addresses. Notice the @ symbol at the beginning of the SUM function. This symbol precedes all functions. If you are typing in a function, you can insert the @ symbol with a Shift+2.

Wouldn't you know it—there is an even quicker way to add together the values in a series of cells. You can click and drag through the cells that you want to add together, and if you include a blank cell at the end of the selection, QuickSum places the total in that cell.

To use QuickSum to total a series of cells

1. Click in the first cell of the series.
2. Click and drag through the series, making sure that you select a blank cell at the end of the row or at the bottom of the column. You can have several blank cells between the last cell with a value and the cell where you want the total. Quattro Pro places the total in the last cell of the selection.
3. Click the QuickSum button on the toolbar. Quattro Pro calculates the total of the cells and places the result in the last cell of the selection (see Figure 25.8).

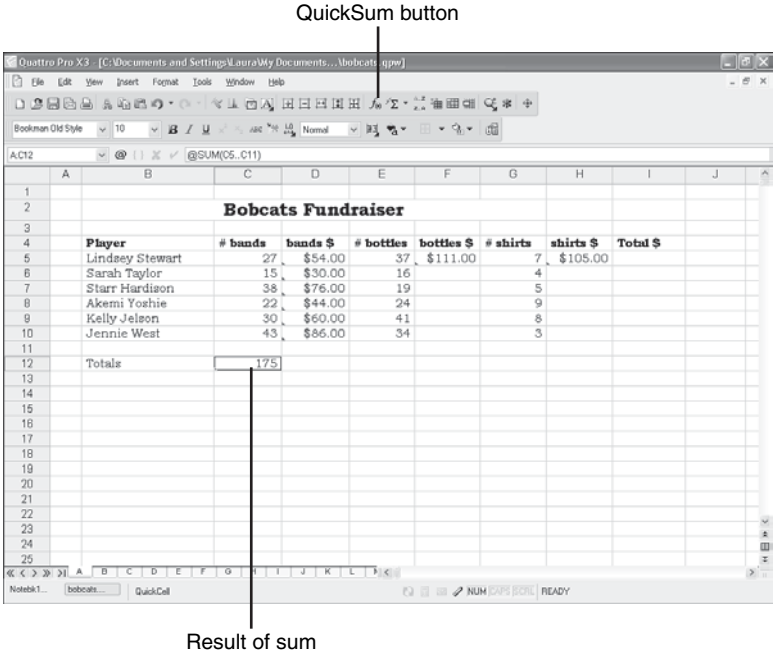

Figure 25.8
QuickSum is a convenient shortcut when you need to add the values in selected cells.

UNDERSTANDING FUNCTIONS

Quattro Pro has more than 500 built-in functions that cover a wide variety of calculations. Not only do the functions save you time in creating formulas from scratch, but they also allow you to perform calculations that would be almost impossible to create.

You will find a complete list of formulas in the Help Index. In the Index tab, type **`functions`**; then scroll down and double-click List (without the quotation marks). Press the Enter key or click Display, and then double-click Quattro Pro Functions List from the list of Help topics (see Figure 25.9). You can also type the function name, such as **`@PAYMT`**, in the Help Index to open a help topic devoted to that function.

The rules for creating a function are as follows:

- A leading at symbol (@), a plus sign (+), or an equal sign (=) must be entered first.
- The function can be typed in upper- or lowercase letters. There cannot be a space between the @ symbol and the function name.
- Arguments are the values, cells, or text strings on which operations are performed. They must be typed in the correct order.
- Multiple arguments are separated by a semicolon (;).
- Optional arguments must be typed within angle brackets, <>.

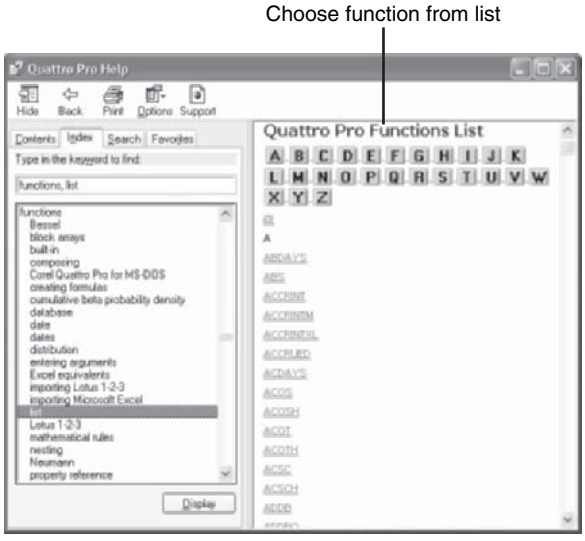

Figure 25.9
Click a function to display a description.

USING THE FORMULA COMPOSER

If you don't care to remember the exact function names or the required arguments, you can select the function from a master list in the Functions dialog box. When you select a function from the Functions dialog box, you are immediately taken into the Formula Composer to finish creating the formula. The Formula Composer helps you build the formula by reminding you which elements are needed and alerting you if there is an error.

To select functions and use the Formula Composer to build the formula

1. Click (or double-click) in the cell where you want to add the function.

2. Click the Insert a Pre-existing Formula button on the input line, or choose Insert, Insert Function to open the Functions dialog box (see Figure 25.10) .

CAUTION

> In step 1, make sure you are double-clicking in a cell that does not already contain a formula. If you don't, you'll go straight to the Formula Composer and bypass the Functions dialog box.

3. Select a function from the list.
4. Click Next to open the Formula Composer (see Figure 25.11). The Formula Composer helps you build formulas by reminding you of the correct syntax and pointing out errors. In Figure 25.11, an error appears because there is no list of cell addresses to sum.

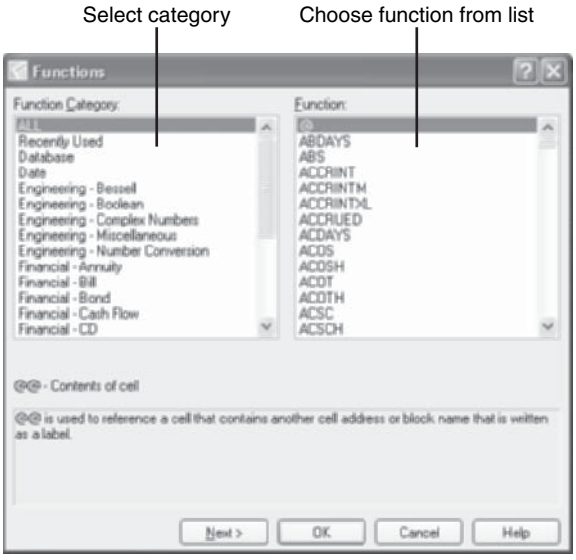

Figure 25.10
Instead of memorizing the syntax for a function, you can select it in the Functions dialog box.

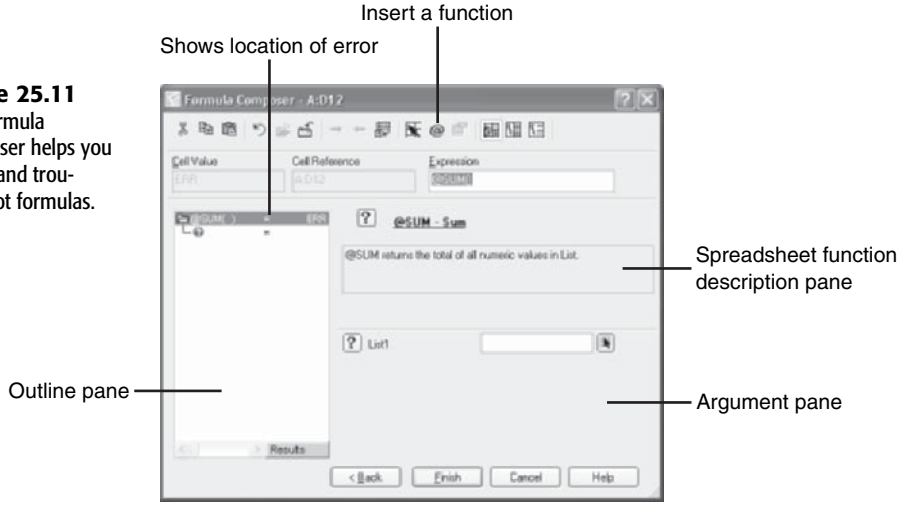

Figure 25.11
The Formula Composer helps you create and troubleshoot formulas.

5. Click the arrow next to the first text box in the Argument pane to minimize the Formula Composer dialog box so that you can see the spreadsheet again.
6. Select the cell or group of cells for the argument (see Figure 25.12).
7. Click the Maximize button on the Formula Composer title bar to display the Formula Composer dialog box again (see Figure 25.13).
8. To add more cells to your formula, click the arrow next to List2 and select the cell or group of cells.

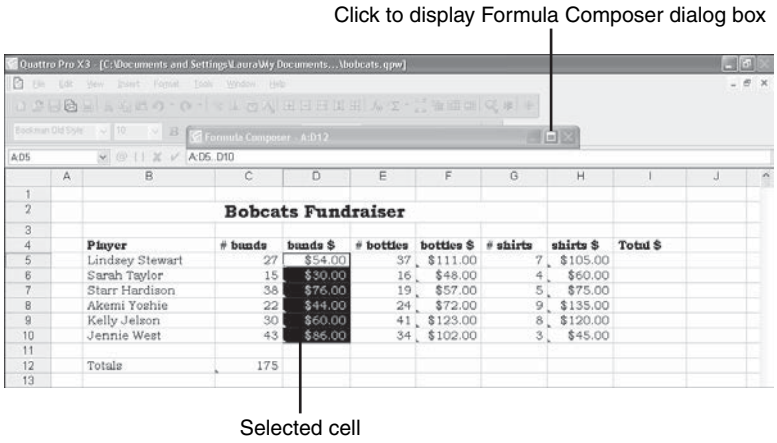

Figure 25.12
The Formula Composer can be minimized to get it out of your way while you select cells.

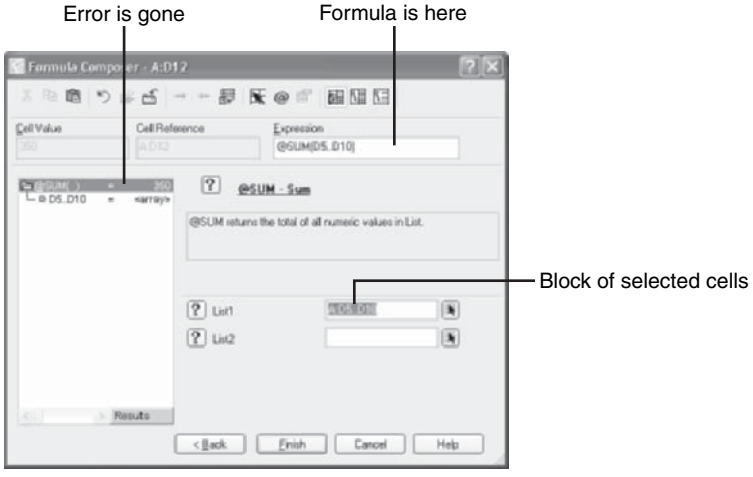

Figure 25.13
Now that you have satisfied the argument requirements, the formula no longer shows as an error.

9. Continue specifying the necessary arguments, and then click Finish when you are done.
10. If there is a problem with the formula, you will see a message box that indicates a syntax error, and you won't be able to close the Formula Composer dialog box. Click OK to clear the message box.

You can use the Formula Composer at any time, not just when you are selecting from the Functions dialog box. The Formula Composer button opens the Formula Composer, where you can create and edit formulas in a selected cell.

To open the Formula Composer to create, edit, or debug a formula

1. Click the Formula Composer button on the toolbar (or press Ctrl+F2) to open the Formula Composer dialog box (see Figure 25.14).
2. Create a new formula or edit an existing formula in the Expression box.

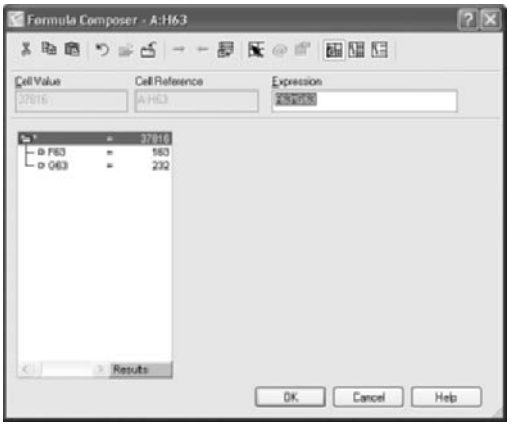

Figure 25.14
The Formula Composer can be used to create, edit, and debug formulas.

ENTERING SPREADSHEET FUNCTIONS MANUALLY

Over time, you will become familiar with the functions that you use often. When you do, you might opt to simply type the function into a cell. For the simpler functions, it's probably faster to type it yourself than to select it from a list. The previous section discusses the Formula Composer, which helps you create more complex formulas.

To type a spreadsheet function in a cell

1. Click (or double-click) the cell that you want to add the function to.
2. Type the `@` symbol and then the name of the function (for example, `@sum`). Remember, the @ symbol must precede all functions.
3. In some cases, an opening parenthesis is inserted for you. If not, type an opening parenthesis to begin the arguments. Look at the application bar and notice that it shows the syntax, or the rules for entering the formula, next to the mode indicators (see Figure 25.15).
4. Either type the arguments or use the mouse to select a cell or group of cells. Notice that in the formula, the left parenthesis is red.
5. Either type the closing parenthesis or press Enter to end that part of the argument. After you type the closing parenthesis, both parentheses turned green to show that you have successfully completed the argument.
6. Continue adding the necessary arguments.
7. Press Enter to add the formula and calculate the result.

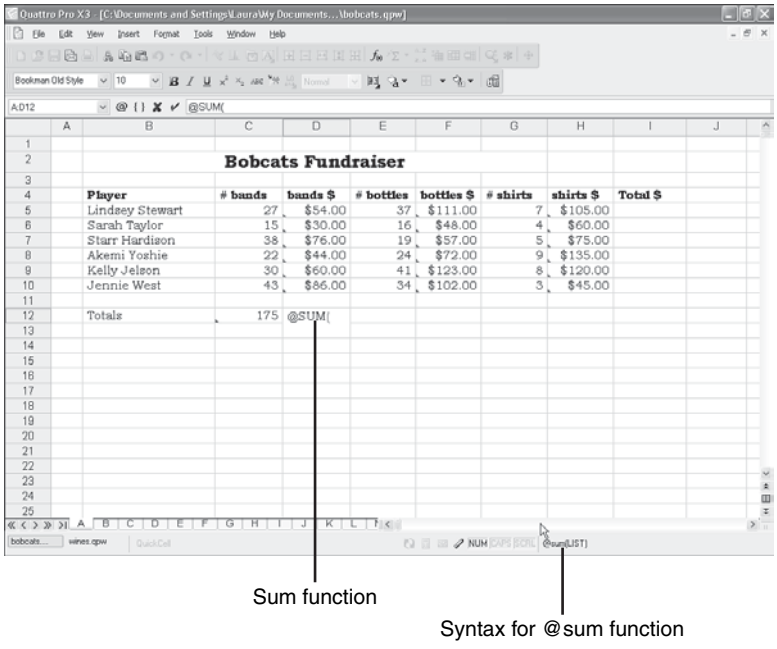

Figure 25.15
The application bar shows the syntax for a function.

TROUBLESHOOTING CALCULATION ERRORS

The more complex your formulas are, the more likely it is that you will have to spend some time getting them working properly. Thankfully, most formula errors can be easily remedied by adding a missing parenthesis, or by fixing an incorrect cell reference.

Quattro Pro has a great troubleshooting tool to help you with more complicated problems. You can use buttons in the Formula Composer to track down the source of the cell addresses in the formula. In doing so, you can determine if the incorrect cell addresses are being used and you can take steps to remedy the situation.

LOOKING FOR ERRORS IN THE FORMULA

If you are using the Formula Composer to create formulas, you'll know right away if there is a problem because the Formula Composer shows the location of the error (refer back to Figure 25.10). Typing a formula in "manually" will also return an error, in the form of the text ERR appearing in the cell instead of the formula result. As you can see, Quattro Pro does a pretty good job of telling you if there is a problem.

Some problems involve formula syntax and punctuation. Here are some common mistakes:

- If a function returns an ERR, it may contain an unmatched parenthesis or bracket. To check and see if this is the case, double-click the cell and move the insertion point through the formula. When you reach an unmatched parenthesis or bracket, the character turns red.

- If a formula shows an ERR, there may be data missing or a cell address may be incorrect. Double-check the formula. If you don't see where the problem is, try re-creating the formula.
- If the formula isn't returning a result at all, Quattro Pro may be interpreting the formula as a label. If you are entering a formula that might be seen as a label (phone numbers or dates), make sure you type a plus sign (+) before the formula.
- If NA appears in a cell, some of the information is not available. For example, if the formula is linked to another source, the source may not be up-to-date.
- Reversed cell references can occur if you accidentally type the row number before the column letter. For example, typing 14C instead of C14.
- If there are extra operators, such as an equal sign or plus sign at the beginning or end of a formula, Quattro Pro will return an error.
- If there are extra spaces in the cell addresses, between the operators or between a function name and the arguments, Quattro Pro will signal an error.
- Make sure there are no extra decimal points or operators in a formula.
- Double-check that you are only using two periods in a range and if you are specifying multiple cell address ranges, that you are only using one semicolon between the ranges.

TRACING ERRORS IN FORMULAS

If you're troubleshooting a calculation error, you might try tracing the error by following the formula's cell references back to their source. The first place you want to look is at the cell and range references in the formula.

To trace errors in formulas

1. Select the cell that contains the formula.
2. Click the Formula Composer button to display the Formula Composer dialog box (see Figure 25.16).
3. Click the cell reference in the outline pane.
4. Click the Follow the Formula button on the Formula Composer toolbar.
5. To return to the standard display, click the Return from the Formula button.

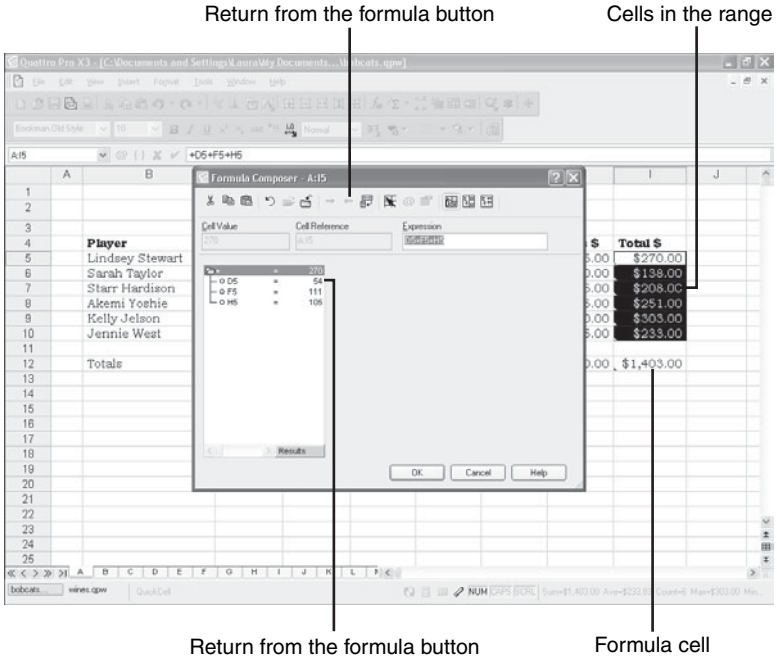

Figure 25.16
The application bar shows the syntax for a function.

TROUBLESHOOTING

MY DATES ARE TURNING INTO NUMBERS

I just typed in a date, but instead of seeing the date in the cell, I'm getting an ERR. This has happened before and instead of seeing the date, I got a strange number. What is going on?

Simply put, Quattro Pro thinks you are typing a formula, not a date. By default, Quattro Pro assumes that everything you type is text, a number, or a date. This default setting can be changed, which would cause Quattro Pro to assume that everything you type is a formula. Choose Tools, Settings, and then click the General item in the Application tree. Remove the check mark next to Mathematical Formula Entry. Choose OK.

Another reason you might have a number instead of a date is if you type your date with dashes (such as 10-26-06), Quattro Pro assumes it is a formula and returns a value. You can solve this in one of two ways: either use slashes (10/26/06) or specify a numeric format for that cell (right-click in the cell, choose Selection Properties, click the Numeric Format tab, select Date, and then choose a format).

If the dashes are important to you and none of the date formats are working, simply tell Quattro Pro that the date is a label and Quattro Pro will stop trying to calculate it (right-click in the cell, choose Selection Properties, click the Constraints tab, and choose Labels Only in the Data Input Constraints section. You'll need to clear the cell contents and retype the date, but then it should stay just as typed.

Check Formulas Before Deleting Cell Names

I did some housecleaning on a notebook and deleted several cell names. Now, some of my formulas are displaying error messages. How can I fix the formulas?

When you delete a cell name from a notebook, Quattro Pro does not automatically adjust the formulas that contain that cell name. Unfortunately, there isn't an easy way to determine which cell goes with which defunct name. If you see the error right away, press Ctrl+Z to undo the change.

The best solution is to double-check your formulas before you delete any cell names. You can easily change the formulas to use another cell (or range).

CHAPTER 26

Organizing and Using Data

In this chapter

by Read Gilgen

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Consolidating Data 687

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Raw data, including information generated by formulas, is the core of what Quattro Pro is all about. However, Quattro Pro also helps you manipulate your data in ways that makes it easier for you, or others, to understand. For example, you can sort or filter your data, use outlines to group data sections, or consolidate two or more sets of data to make it easier to get the broad picture.

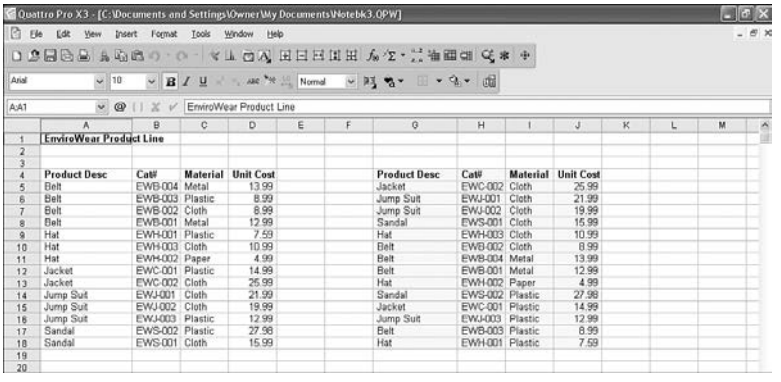
NOTE

> The way you use data will likely vary dramatically from the way others use theirs. The examples shown in this chapter are intended to illustrate some possibilities. Undoubtedly you will discover other uses for these features, and along the way, will learn different ways of organizing and manipulating your data.

SORTING DATA

One of the most commonly needed tools when working with notebook sheets (spreadsheets) is the ability to sort data results. In many ways notebooks are very much like databases, where each row represents a record (for example, individual items in a product line), and each column represents a field (for example, size, material, cost, number ordered, or number sold).

Sorting enables you to order records based on criteria you select from specific fields. Consider the two notebooks shown in Figure 26.1. The first sorts the products alphabetically. The second sorts the same information by material, also by cost, in descending value, within each material group.



	A	B	C	D	G	H	I	J
1	EnviroWear Product Line							
2								
3								
4	Product Desc	Cat#	Material	Unit Cost	Product Desc	Cat#	Material	Unit Cost
5	Belt	EWB-004	Metal	13.99	Jacket	EWC-002	Cloth	25.99
6	Belt	EWB-003	Plastic	8.99	Jump Suit	EWJ-001	Cloth	21.99
7	Belt	EWB-002	Cloth	8.99	Jump Suit	EWJ-002	Cloth	19.99
8	Belt	EWB-001	Metal	12.99	Sandal	EWS-001	Cloth	15.99
9	Hat	EWH-001	Plastic	7.59	Hat	EWH-003	Cloth	10.99
10	Hat	EWH-003	Cloth	10.99	Belt	EWB-002	Cloth	8.99
11	Hat	EWH-002	Paper	4.99	Belt	EWB-004	Metal	13.99
12	Jacket	EWC-001	Plastic	14.99	Belt	EWB-001	Metal	12.99
13	Jacket	EWC-002	Cloth	25.99	Hat	EWH-002	Paper	4.99
14	Jump Suit	EWJ-001	Cloth	21.99	Sandal	EWS-002	Plastic	27.98
15	Jump Suit	EWJ-002	Cloth	19.99	Jacket	EWC-001	Plastic	14.99
16	Jump Suit	EWJ-003	Plastic	12.99	Jump Suit	EWJ-003	Plastic	12.99
17	Sandal	EWS-002	Plastic	27.98	Belt	EWB-003	Plastic	8.99
18	Sandal	EWS-001	Cloth	15.99	Hat	EWH-001	Plastic	7.59
19								
20								

Figure 26.1
Sorting data can make it easier to understand your data.

To sort the data in Figure 26.1, or any other similar data layout, follow these steps:

1. Select all of the cells in the rows and columns you want to sort.

CAUTION

> Sorting records requires that you select all of the columns for each row of data. Otherwise sorting disassociates part of each row's data. If you forget, simply use Undo and start over again. It's also a good idea to save your notebook before you start so you can return to the original should you get hopelessly lost.

2. Choose Tools, Sort, or press Alt+F9. Quattro Pro displays the Data Sort dialog box (see Figure 26.2)

Figure 26.2
Use the Data Sort dialog box to sort blocks of Quattro Pro data.

3. The Cell box should display the block of cells you already selected. If not, click the Range picker button, select the block of cells, and press Enter, or double click the Data Sort dialog box title bar.

TIP FROM

Read Gilgen

> If you include the row of column heading labels in the block, and specify that the block contains a heading, you can more easily select criteria based on column headings rather than on generic notebook column numbers.

4. Select the first Sort criterion by clicking the drop-down arrow and selecting the column Heading (for example, Description, Unit Cost, and so on) or the name of the column (for example, A, B, C, and so on).
5. If you want to sort in ascending order, leave the Ascending check box checked. Uncheck it to sort that column in descending order.
6. If you want to specify a secondary sorting criterion, repeat step 5 in the second drop-down box.

NOTE

> If you use more than one sort criterion, Quattro Pro sorts everything first based on the first criterion, and then sorts within each resulting category based on the second criterion, and so on. For example, if you sort all last names first, and then by first names, all Smiths are grouped together, and then sorted within Smith by their first names.

7. If the selected block contains a heading that should remain at the top of the data after it is sorted, make sure the Selection Contains a Heading box is checked. Otherwise, the heading row sorts along with the rest of the data.
8. Click Sort to complete the sort.

Using Quattro Pro's sort feature, you can arrange the data in various ways, depending on how you want to view it. If seeing the most expensive items together is important, sort by price. If you need to find all of a like product, sort by name.

If your sorting seems to work on everything except the first row of data, and your loan amounts seem way out of whack, see "How Come Everything Sorts Except the Top Row?" in the Troubleshooting section at the end of this chapter.

FILTERING DATA

The amount of data you have to view can be somewhat overwhelming, especially in an extensive notebook. Although you can group data by sorting, a quicker way to view parts of your data is to use the QuickFilter feature.

To filter data quickly, follow these steps:

1. Click anywhere in the data of your notebook.
2. Choose Tools, QuickFilter. Quattro Pro displays drop-down menus at the top of each column (see Figure 26.3, which also shows a drop-down menu). This works best if your columns have headings.
3. Click the drop-down menu for any column and select what you want to filter by. Quattro Pro displays only the rows that match the criterion found in that column. The drop-down arrow also turns blue to indicate that only a subset of the entire notebook data is displayed (refer to Figure 26.3).
4. Click drop-downs for other columns to filter your selection further.

NOTE

> Filtering is like sorting, except that Quattro Pro hides irrelevant data. Thus, when you filter a second time, you do so only on the visible data that was left after your first filter. You must choose (Show All) from each blue-arrow drop-down menu to list everything again.

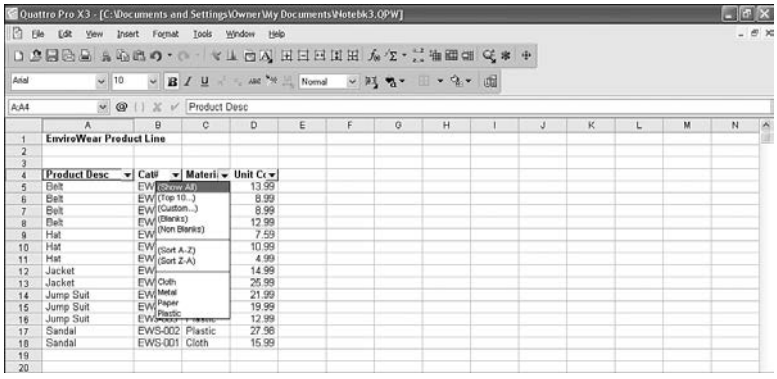


Figure 26.3
The QuickFilter feature lets you display only selected parts of your data.

One particularly interesting filter is one that enables you to display only the top *n* values. For example, you want to know which are the top selling products, based on volume. You simply turn on QuickFilter, select the drop-down from the Total Sales column, and click Top 10. Quattro Pro displays the Top Ten QuickFilter (see Figure 26.4). You can specify the top or bottom, how many (not only ten), and whether to filter by value or percent. When you click OK, Quattro Pro displays the top (or bottom) sellers from the list.

Figure 26.4
QuickFilter options include the ability to return a specified number of highest or lowest values.

If the result doesn't seem to include everything it should, see "Where's All My Data?" in the Troubleshooting section at the end of this chapter.

OUTLINING DATA

In long notebooks (with many rows), it's often difficult to get an overview of the data, and it's also difficult to scroll up and down just to see what's in the notebook. Quattro Pro's outline feature helps you organize, and thus better view just the data you want to see and, if available, summary information for groups of data.

CREATING MANUAL OUTLINES

A simple way to create outlines is to select rows or columns and group them manually as outline groups. Consider, for example, the notebook shown in Figure 26.5. This is the same data as that found in Figure 26.3, but organized in manually created outlines, most of which have been collapsed.

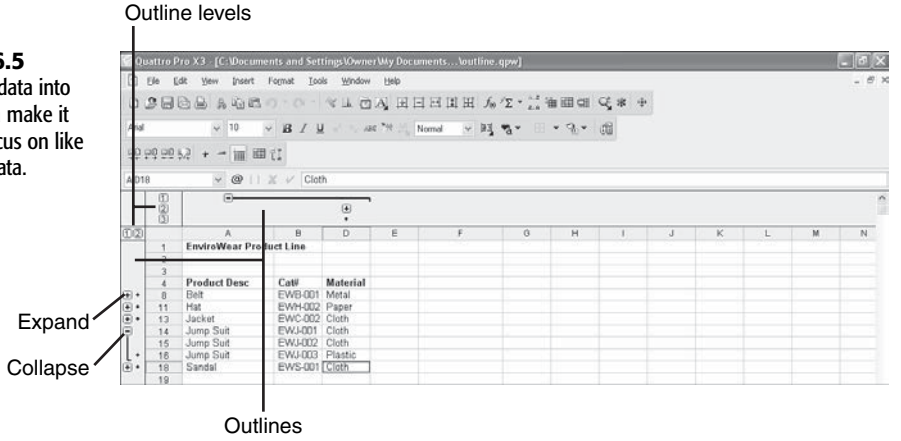


Figure 26.5
Organizing data into outlines can make it easier to focus on like groups of data.

To create outline groups manually, follow these steps:

1. Sort the data so that groups of outline data are contiguous.
2. Click and drag the row number labels or column letter labels to select all of the rows or columns that should be grouped together.
3. Choose Tools, Outline, Group Outline, or press Shift+F8. If you turned on the Outlining toolbar, you can also click the button to Group Selected Cells As Part of an Outline. Quattro Pro groups the selected rows or columns and shows the outlines at the top or left edge of the notebook.
4. Repeat steps 2–3 to create additional outline subgroups, as desired.

To use an outlined notebook, simply click the "+" or "-" icons in the outline area to expand or collapse associated outline groups.

At the top of the left margin, or the left of the top margin, you find two or more square numbered boxes. These numbers represent outline levels. For example, clicking box 1 displays only the top outline level, clicking box 2 displays the first sublevel group of outlines, and so on.

NOTE

> Quattro Pro collapses outline groups to display only the bottom row or the rightmost column.

CREATING AUTOMATIC OUTLINES

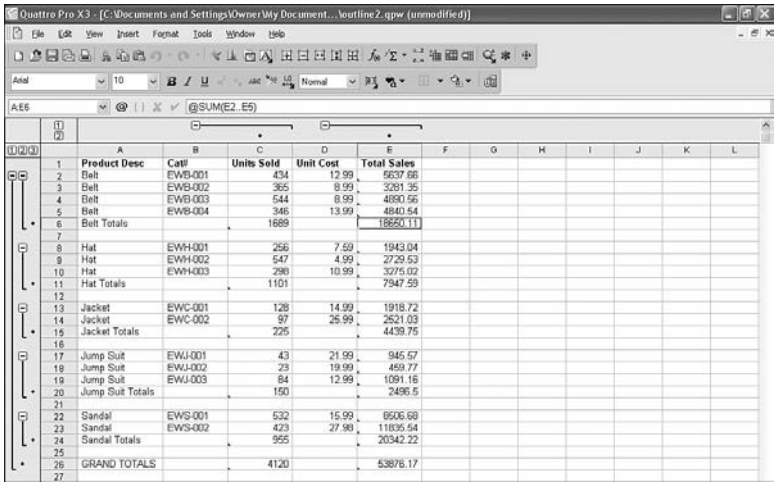
If you also use formulas to summarize data in a notebook, you can automatically create outlines based on the summary cells. Consider, for example, the notebook in Figure 26.6, which includes a sum of sales for each product group.

To generate a notebook outline automatically, follow these steps:

1. Organize your notebook by groups.
2. Insert blank rows between groups.
3. Create summary cells (for example, QuickSum) for each group. You must have at least one such summary cell for each group, but you can have more (refer to Figure 26.6).

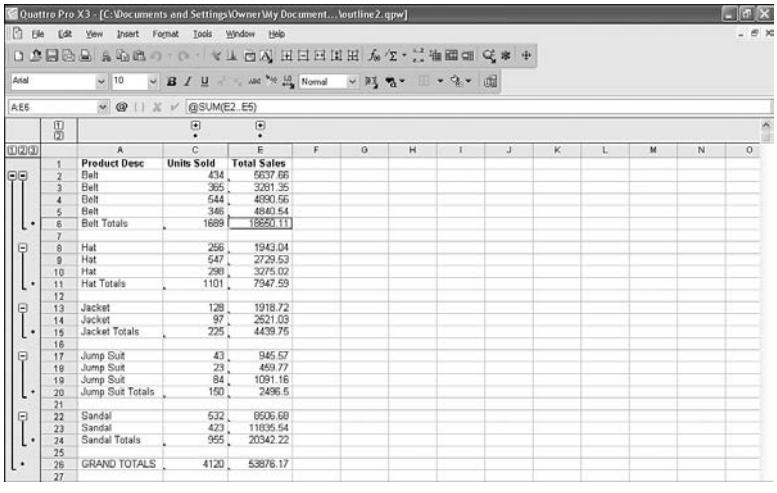
4. Finally, choose Tools, Outline, Auto Outline, or click the button on the Outlining toolbar to Automatically Create an Outline Based from the Currently Selected Cells. Quattro Pro automatically generates outline groups (refer to Figure 26.6).

You can also add manual outline groups to your automatically generated outline groups. For example, if you want to hide information that isn't relevant to summary information (for example, part numbers or unit costs), you can group these with columns that are relevant, and then collapse the groups to display only the relevant columns (see Figure 26.7).



	Product Desc	Cat#	Units Sold	Unit Cost	Total Sales
2	Belt	EWB-001	434	12.99	5637.66
3	Belt	EWB-002	365	8.99	3281.35
4	Belt	EWB-003	544	8.99	4890.56
5	Belt	EWB-004	346	13.99	4840.54
6	Belt Totals		1689		18650.11
8	Hat	EWH-001	256	7.59	1943.04
9	Hat	EWH-002	547	4.99	2729.53
10	Hat	EWH-003	298	10.99	3275.02
11	Hat Totals		1101		7947.59
13	Jacket	EWC-001	128	14.99	1918.72
14	Jacket	EWC-002	97	25.99	2521.03
15	Jacket Totals		225		4439.75
17	Jump Suit	EWJ-001	43	21.99	945.57
18	Jump Suit	EWJ-002	23	19.99	459.77
19	Jump Suit	EWJ-003	84	12.99	1091.16
20	Jump Suit Totals		150		2496.5
22	Sandal	EWS-001	532	15.99	8506.68
23	Sandal	EWS-002	423	27.98	11835.54
24	Sandal Totals		955		20342.22
26	GRAND TOTALS		4120		53876.17

Figure 26.6
Notebooks with summary cells for groups of data lend themselves well to automatically generated outlines.



	Product Desc	Units Sold	Total Sales
2	Belt	434	5637.66
3	Belt	365	3281.35
4	Belt	544	4890.56
5	Belt	346	4840.54
6	Belt Totals	1689	18650.11
8	Hat	256	1943.04
9	Hat	547	2729.53
10	Hat	298	3275.02
11	Hat Totals	1101	7947.59
13	Jacket	128	1918.72
14	Jacket	97	2521.03
15	Jacket Totals	225	4439.75
17	Jump Suit	43	945.57
18	Jump Suit	23	459.77
19	Jump Suit	84	1091.16
20	Jump Suit Totals	150	2496.5
22	Sandal	532	8506.68
23	Sandal	423	11835.54
24	Sandal Totals	955	20342.22
26	GRAND TOTALS	4120	53876.17

Figure 26.7
You can combine manual and automatically generated outlines.

CREATING SUBTOTALS AND TOTALS

Creating automatic outlines depends on already having summary cells of data, for example, subtotals. Quattro Pro provides a nifty tool for automatically generating subtotals and totals, based on the criteria you provide. The result also generates outlines as described in the preceding section.

To generate subtotals and totals for the notebook shown in Figure 26.5, follow these steps:

1. Sort the data so that at least one field is grouped into categories for which you want subtotals, for example Product Description.
2. Position the cursor anywhere within the notebook data.
3. Choose Tools, Data Tools, QuickSubtotal, Edit QuickSubtotals. Quattro Pro displays the QuickSubtotals dialog box (see Figure 26.8).

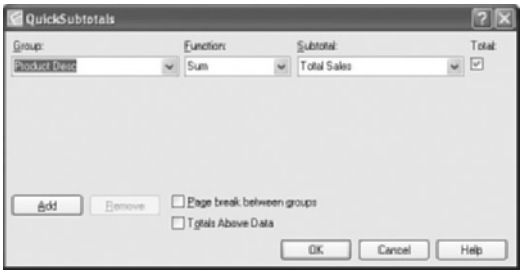
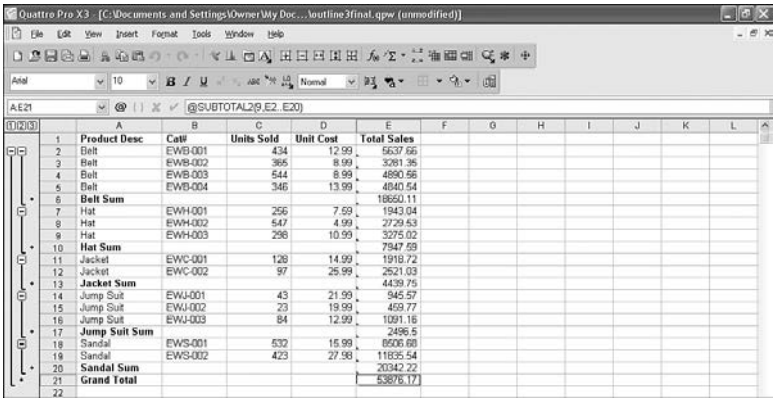


Figure 26.8
Use the QuickSubtotals dialog box to automatically generate subtotals and totals.

4. From the drop-down menus, select the Group (for example, Product Desc), what you want to do with the selected subgroup of data (for example, Sum), and which column of data to subtotal (for example, Total Sales).
5. If you also want a grand total, check the Total box.
6. Click OK and Quattro Pro automatically inserts blank rows, labels, subtotal, and grand total formulas, and creates outline levels (see Figure 26.9).



	A	B	C	D	E
1	Product Desc	Cat#	Units Sold	Unit Cost	Total Sales
2	Belt	EWB-001	434	12.99	5637.66
3	Belt	EWB-002	365	8.99	3281.35
4	Belt	EWB-003	544	8.99	4890.56
5	Belt	EWB-004	346	13.99	4840.54
6	**Belt Sum**				18650.11
7	Hat	EWH-001	256	7.59	1943.04
8	Hat	EWH-002	547	4.99	2729.53
9	Hat	EWH-003	298	10.99	3275.02
10	**Hat Sum**				7947.59
11	Jacket	EWC-001	128	14.99	1918.72
12	Jacket	EWC-002	97	25.99	2521.03
13	**Jacket Sum**				4439.75
14	Jump Suit	EWJ-001	43	21.99	945.57
15	Jump Suit	EWJ-002	23	19.99	459.77
16	Jump Suit	EWJ-003	84	12.99	1091.16
17	**Jump Suit Sum**				2496.5
18	Sandal	EWS-001	532	15.99	8506.68
19	Sandal	EWS-002	423	27.98	11835.54
20	**Sandal Sum**				20342.22
21	**Grand Total**				53876.17
22					

Figure 26.9
Creating subtotals and totals also automatically generates outlines.

CONSOLIDATING DATA

Sometimes you find that data you need is in one or more different notebooks, but that you really need to consolidate it into one location. For example, your East and your West region sales departments send you notebooks that contain similar data. In order to see how both regions together are doing, you need to use Quattro Pro's Consolidation tool.

To consolidate two or more sets of data, follow these steps:

1. Make sure that the two sets of data contain similar types of information, either by location (for example, Sandal #EWS-002 for each set of data that is in the same row, relative to other data), or by label (for example, each set of data has a Sandal label).
2. Choose Tools, Consolidate, New. Quattro Pro displays the Consolidate Expert (see Figure 26.10).

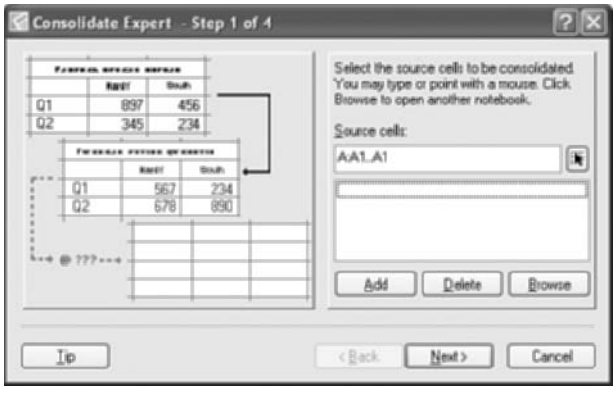


Figure 26.10
Use the Consolidate Expert to consolidate blocks of data from the current notebook or also from other notebooks.

3. Select the first block of cells to consolidate, by typing the range, or by using the Range picker tool. Click Add to add the block to the list.
4. Repeat step 3 until you have selected all the blocks you want to consolidate.

TIP FROM

Read Gilgen

> Blocks can come from the current page of the notebook, from other sheets in the notebook, or even from other notebooks (click the Browse button to find another Quattro Pro notebook).

5. Click Next and choose the method by which you want to combine the data. Typically you sum the data, but you can also average, count, or use statistical functions.
6. Click Next and choose the destination cells, which can be on the current notebook sheet, or on another sheet in the same notebook.
7. Specify if you want to use labels from the top row, or the leftmost column. If you use labels, Quattro Pro will attempt to consolidate all data cells that fall in the same label

categories. For example, if you have three Coat records in one set of data, and two in another, Quattro Pro combines the data from all five locations into one Coat cell.

TIP FROM

Read Gilgen

Quattro Pro's method for using labels can be a bit clumsy. You cannot specify a column to use for labels, just whether to use the leftmost column or not. However, you can consolidate blocks differently, complete with labels. Just select the data and make sure the leftmost column is the set of labels you want to use. For example, to consolidate by product type, include that as the leftmost column. To consolidate by product number, make sure that column is the leftmost column selected.

8. Click Next and provide a name for your consolidation setup. This enables you to use this same setup again without having to re-create it.
9. Click Consolidate and Quattro Pro generates the consolidated information (see Figure 26.11, which shows two different consolidations from the same data, and also shows Precedence arrows to make it clearer to see where the data comes from).

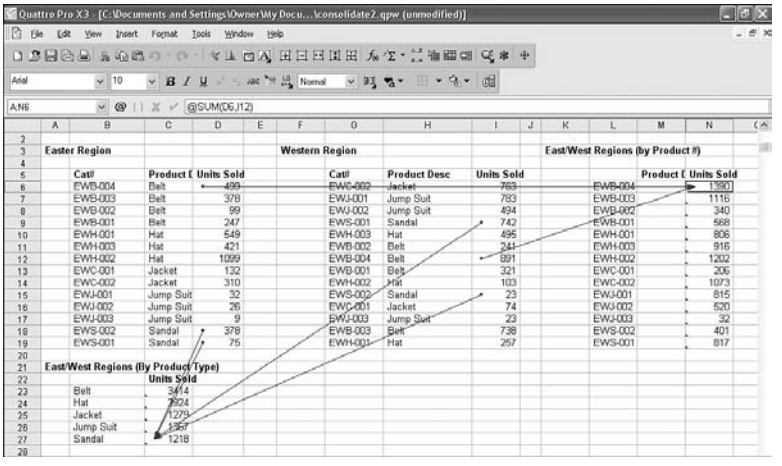


Figure 26.11
The Precedence arrows illustrate the sources of the consolidated data.

NOTE

Quattro Pro uses functions to refer from the consolidated data back to the source data. Changing the original data also changes the consolidated data.

TROUBLESHOOTING

HOW COME EVERYTHING SORTS EXCEPT THE TOP ROW?

When I sort a block of data, everything seems to sort correctly except the top row, which is out of order.

This is a common problem, but also one that's easy to fix. In the Sort dialog box, you have an option to indicate whether the block of data has headings (labels at the top).

If you select a block that does not have headings, but leave this box checked, Quattro Pro assumes that the first row of data is the heading row, and thus does include it in the sort. Just uncheck the box to sort all rows of the block.

WHERE'S ALL MY DATA?

When I use filtering, sometimes I don't see everything for the category I choose.

Filtering works on the same principles as sorting. That is, the first or primary filtering criterion hides all non-qualifying data. The next criterion applies only to the non-hidden data that resulted from the first filtering.

If you want to filter on all of the data, make sure that you click any blue drop-down arrows at the top of the columns of data and select All before applying a filter that you want to be a primary filter.

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CHAPTER 27

Analyzing Data

In this chapter

by Read Gilgen

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Using Cross Tabs 700

Using the Analysis Expert 705

Troubleshooting 710

Organizing and manipulating raw data is one way to understand the overall picture. However, some of Quattro Pro's most stunning power comes in the ways you can analyze data. For example, you can create what-if scenarios, solve for specific solutions, or use one of several predefined analysis experts.

NOTE

> Quattro Pro offers a wide range of powerful analysis tools. A comprehensive look at all of these tools is far beyond the scope of this book. If you're already familiar with financial modeling and analysis, you'll quickly discover how well Quattro Pro provides you with just the tools you need. If you're a neophyte, you can rely on Quattro Pro's predefined experts, or you can use Quattro Pro's help screens to learn how to create models for yourself.
>
> The examples shown in this chapter are intended to illustrate typical procedures for just a few possibilities.

FINDING THE BEST SOLUTIONS

Depending on the number of variables in a notebook, bottom-line results can vary dramatically with a change in even one variable. However, taking the time to change each variable *and* each combination of variables manually could be nearly impossible.

Quattro Pro provides two tools that help you prepare best-case answers.

USING OPTIMIZER

You use the Optimizer tool when the solution depends on two or more interrelated variables.

Consider, for example, the notebook shown in Figure 27.1. An EnviroWear manager has estimate a potential production scenario based on costs and capacity. However, he's not sure how many of each item to produce to maximize potential profits.

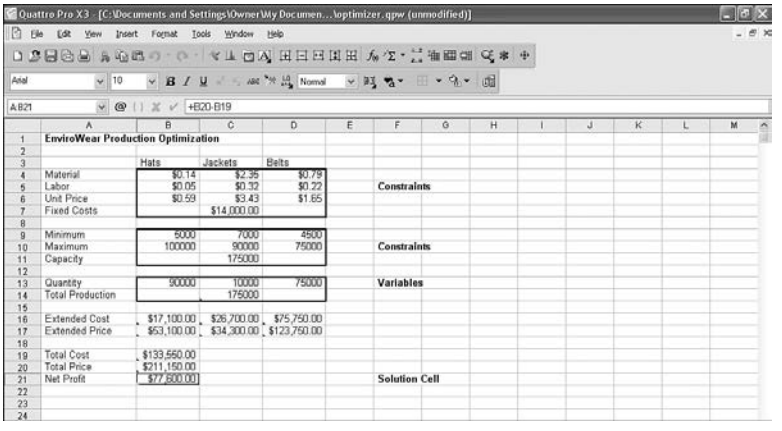


Figure 27.1
Optimizer problems consist of various constraints, variables to be considered, and a solution cell.

Each Optimizer problem must have one or more *adjustable* cells (cells that contain variables). Such cells can include numbers only.

Optimizer problems also include *constraints* (conditions or limits to values). For example, your factory might be constrained in being able to produce only 175000 units in any given month because of equipment or employee capacities.

A *solution cell* is the target of the optimal solution. Typically you create this cell yourself, but if you don't, Quattro Pro finds answers that meet the specified constraints.

After creating a notebook with a proposed solution, you can use the Optimizer to see if there's a better one. For example, to optimize the notebook shown in Figure 27.1, follow these steps:

1. Choose Tools, Numeric Tools, Optimizer. Quattro Pro displays the Optimizer dialog box (see Figure 27.2, which shows several selections already in place).

Figure 27.2
The Optimizer dialog box helps you define the variables, constraints, and solution cell.

2. Define the Variable cells using the Range picker. In this case, the Quantity row contains the three production variables.
3. Define the first Constraints cells by clicking Add. Quattro Pro displays the Add Constraints dialog box (see Figure 27.3). Use the Range picker to select the appropriate cells, choose a Boolean operator (equals, less than, and so on), and select the constant cells. For example, each of the Quantity cells cannot exceed the Maximum Capacity, nor be smaller than the minimum capacity.

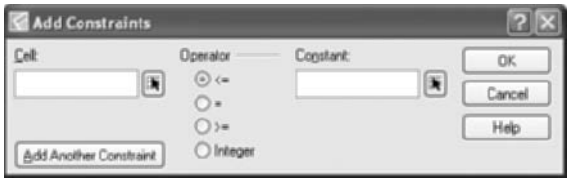


Figure 27.3
Constraints are identified by Boolean logic, such as equals, greater than, and so on.

4. Click Add Another Constraint as needed until you have in place all of the constraints for solving the problem, and then click OK to return to the Optimizer dialog box.
5. Specify the Solution Cell, for example, the Net Profit cell.

At this point you're ready to begin trying out various possible solutions to reach different goals. As you consider various options, you can use the following tools:

- **Max**—How many units of each must you produce to get the maximum profit?
- **Min**—How many units of each do you produce to get the least profit? Although this isn't terribly useful in this situation, you might be looking for the minimum number of person hours required to reach a certain target.
- **Target Value**—If you want to know what it will take to make a certain profit, you can specify that target and the Optimizer shows you just how to do it.
- **Solve**—Click this button to apply the changes in solution you select.
- **Revert**—Goes back to the previous solution

TIP FROM

Read Gilgen

The Optimizer Revert option is like Undo, except that it reverts only to the most recent change. If you want to revert farther back, close the Optimizer dialog box and use Quattro Pro's regular Undo feature until you get the solution you want to revert to.

- **Reset**—Clears all dialog box settings.

CAUTION

If you clear (reset) the settings, you have to start over again, even if you click Cancel and return again to the Optimizer. If you saved the document with Optimize settings, you can close the document without saving, and open it again to get the settings back.

- **Options**—By default, Quattro Pro uses certain procedures and iterations to come up with the best solution, as shown in the Optimizer Options dialog box (see Figure 27.4). However, if you are quite familiar with modeling procedures, you can change the methodology to better match the approach you might take.

USING SOLVE FOR

The Solve For tool is handy when your data has only one variable. In other words, sometimes you know the answer you want, but aren't sure how to change a key variable to get to that answer. For example, you know how to calculate a loan payment, based on amount, rate, and term. However, you already know what payment you can afford, and really need to know how to get to that amount.

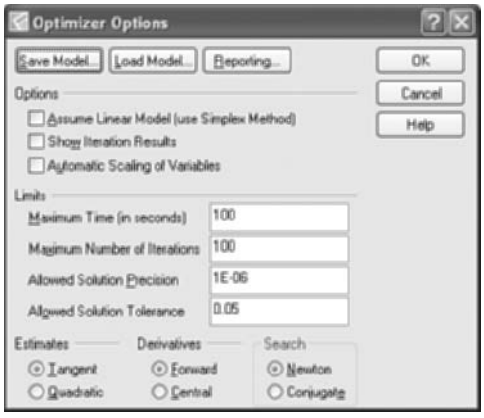


Figure 27.4
You can fine tune the Optimizer procedures to make sure, for example, that formulas are solved in the proper order.

Using Quattro Pro's Solve For feature, you can specify that the loan amount is variable, and has to result in the payment amount you specify. To try this simple experiment, follow these steps:

1. Create the notebook shown in Figure 27.5. The only cell that contains a formula is B7: @PMT(B3,B4/12,B5).

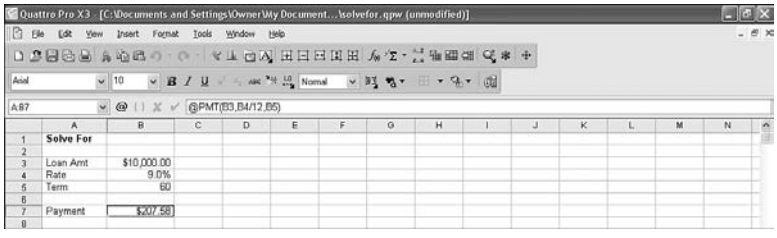


Figure 27.5
Solve For notebooks contain the basic data and formula so that Quattro Pro can do its work.

2. Choose Tools, Numeric Tools, Solve For. Quattro Pro displays the Solve For dialog box (see Figure 27.6, which shows values for this example already selected).

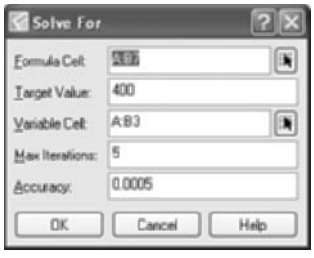


Figure 27.6
Use the Solve For dialog box to come up with a solution you specify.

3. Use the Range picker to select the Target Cell (the PMT function) and specify the Target Value (325, the amount you can afford).

4. Use the Range picker to select the Variable Cell, in this case the loan amount cell.
5. Click OK and Quattro Pro changes the loan amount to match the desired payment amount.

You can change other values, for example, the percentage rate and the number of months in the term of the loan, and run the Solve For option again. Don't forget to use Undo if you want to revert to a previous solution.

If your loan amounts seem way out of whack, see "Yikes! Why Is My Loan So High?" in the Troubleshooting section at the end of this chapter.

USING WHAT-IF ANALYSIS

What-If tools enable you to ask how the results of a formula would change if you change one or two variables. Quattro Pro essentially takes a model formula and generates a table of results based on a list of variable changes.

For example, suppose you want to determine how much salary increase you need each year to keep up with, or stay ahead of, inflation. To project annual gross and net increases, follow these steps, based on the notebook shown in Figure 27.7, which shows formulas where present:

TIP FROM

Read Gilgen

To troubleshoot formulas in a notebook, you can choose View, Formulas to display all formulas instead of results. To return to the regular view, just choose View, Formulas again.

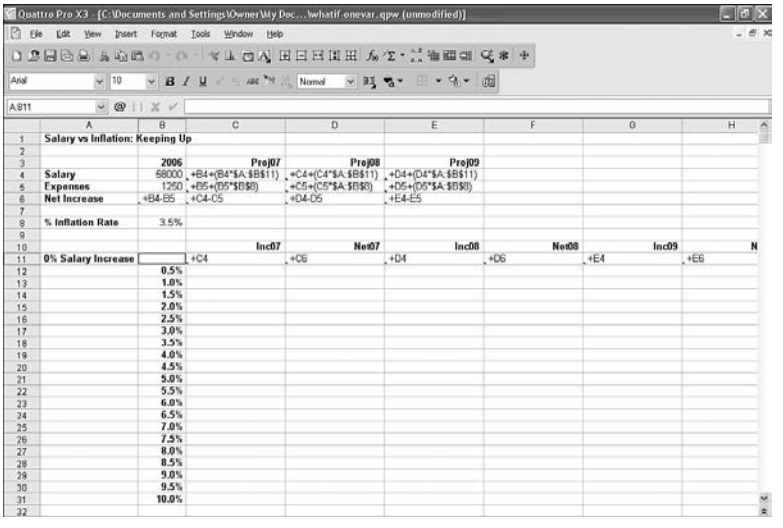


Figure 27.7
Accurate What-If scenarios depend on creating correct underlying data.

1. Create the labels, as shown. You can use QuickFill to create the list of percentages (.005, .01, .015…). You probably want to format the list to display as percentages (Format, Selection Properties, Numeric Format).
2. Enter current values for Salary (B4), Expenses (B5), and Inflation Rate (B8).
3. Create the formula for Expenses for next year (C5) by multiplying current expenses times the inflation rate, and adding the result to the current expenses: +B5+(B5*B8). The $ sign represents an absolute location for both the row and column because as you replicate the formula, you don't want the reference to the inflation rate to change.

TIP FROM

Read Gilgen

> While editing a cell reference, you can quickly change from relative to absolute by pressing F4 repeatedly until you get the combination you want.

4. Create the formula for Salary for next year (C4) by multiplying the current salary times the projected percentage salary increase and adding the result to the current salary. Note, however, that the projected salary cell (B11) is blank, and the result displayed in C4 will appear to be the same as last year's salary (B4). Again, make the salary increase percentage cell absolute: +B4+(B4*B11).
5. Create the formula for the net increase in cell C6 by subtracting expenses from salary (+C4-C5).
6. Now you can replicate the formulas in Column C by selecting and copying cells C4, C5, and C6, and pasting them in columns D and E. Because you use absolute references for cells B8 and B11 in your formulas, those references remain unchanged in the pasted cells. However, relative references do change in the pasted cells to reflect their current position.
7. The list of salary increase percentages will represent the variable input for the What-If Table. At the top of each column to the right of the variable percentages, insert a formula that uses B11 as the input cell. In the sample shown in Figure 27.7, you simply reference the formula cells created above (C4, C6, D4, D6, and so on).
8. Choose Tools, Numeric Tools, What-If Tables, or click the Build What If Tables button on the Experts and Numeric Tools toolbar. Quattro Pro displays the What-If dialog box (see Figure 27.8, which shows values already selected) .

Figure 27.8
Use the What-If dialog box to select the initial table area and input cell.

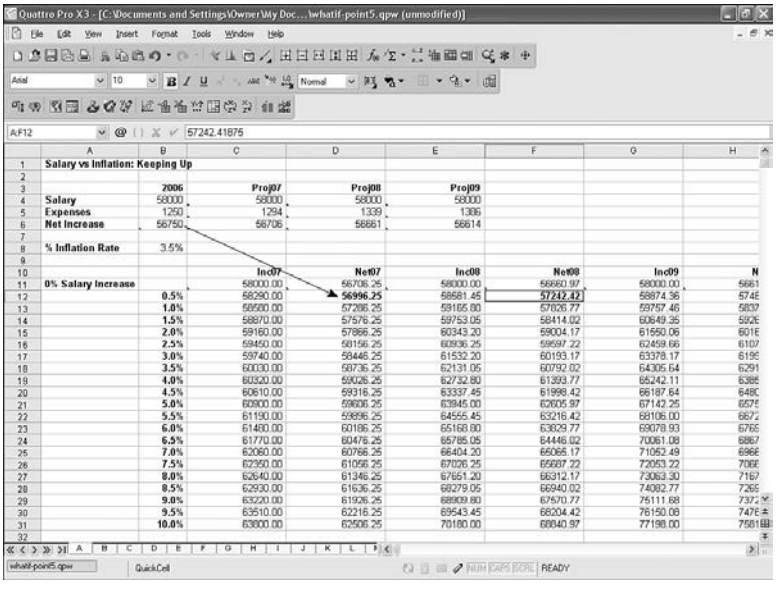
TIP FROM

Read Gilgen

> You can save lots of time by displaying the Experts and Numeric Tools toolbar. You'll be returning to this dialog box often as you make changes to your What-If scenarios.

9. Use the Range picker to select the block of cells that constitutes the table (for example, B11..H31).
10. Use the Range picker to select the input cell (B11). Note that the input cell is blank, but it represents the salary increase percentage value used in other formulas in the notebook.
11. Make sure One Free Variable is selected at the What-If table type.
12. Click Generate to create the What-If table (see Figure 27.9, where highlighted cells have been added after generating the table).

Figure 27.9
A What-If table helps you see a range of possible results.

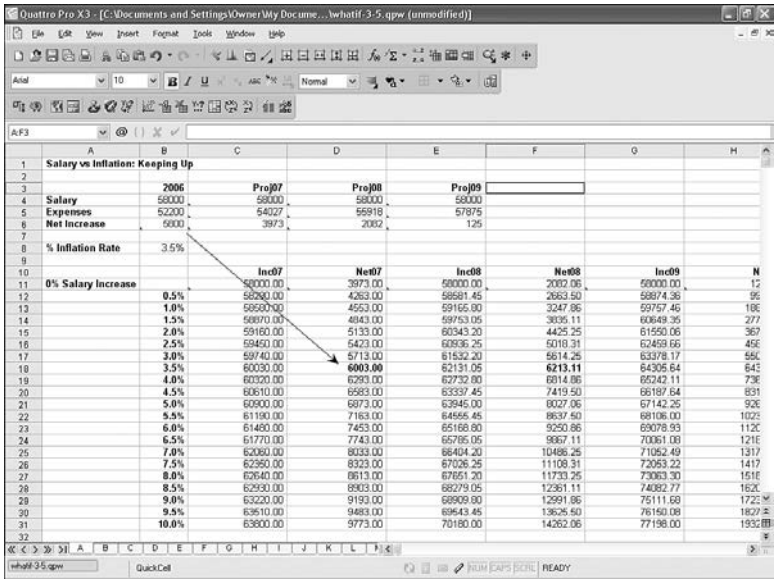


	A	B	C	D	E	F	G	H
1	Salary vs Inflation: Keeping Up							
2								
3		2006	Proj07	Proj08	Proj09			
4	Salary	58000	58000	58000	58000			
5	Expenses	1250	1294	1339	1386			
6	Net Increase	56750	56706	56661	56614			
7								
8	% Inflation Rate	3.5%						
9								
10			Inc07	Net07	Inc08	Net08	Inc09	N
11	0% Salary Increase		58000.00	56706.25	58000.00	56660.97	58000.00	5661
12		0.5%	58290.00	56996.25	58581.45	57242.42	58874.36	5748
13		1.0%	58580.00	57286.25	59165.00	57826.77	59757.46	5837
14		1.5%	58870.00	57576.25	59753.05	58414.02	60649.35	5926
15		2.0%	59160.00	57866.25	60343.20	59004.17	61550.06	6016
16		2.5%	59450.00	58156.25	60936.25	59597.22	62459.66	6107
17		3.0%	59740.00	58446.25	61532.20	60193.17	63378.17	6199
18		3.5%	60030.00	58736.25	62131.05	60792.02	64305.64	6291
19		4.0%	60320.00	59026.25	62732.80	61393.77	65242.11	6386
20		4.5%	60610.00	59316.25	63337.45	61998.42	66187.64	6480
21		5.0%	60900.00	59606.25	63945.00	62605.97	67142.25	6575
22		5.5%	61190.00	59896.25	64555.45	63216.42	68106.00	6672
23		6.0%	61480.00	60186.25	65168.80	63829.77	69078.93	6769
24		6.5%	61770.00	60476.25	65785.05	64446.02	70061.08	6867
25		7.0%	62060.00	60766.25	66404.20	65065.17	71052.49	6966
26		7.5%	62350.00	61056.25	67026.25	65687.22	72053.22	7066
27		8.0%	62640.00	61346.25	67651.20	66312.17	73063.30	7167
28		8.5%	62930.00	61636.25	68279.05	66940.02	74082.77	7269
29		9.0%	63220.00	61926.25	68909.80	67570.77	75111.68	737
30		9.5%	63510.00	62216.25	69543.45	68204.42	76150.08	7476
31		10.0%	63800.00	62506.25	70180.00	68840.97	77198.00	7581
32								

You now can clearly see that you have to have at least a .5% increase just to keep up with inflation in terms of net income. The bad news is that your other expenses, such as living expenses, are affected also by inflation, so to get a real picture of what salary increases you need, you should try the same What-If table against all your expenses, not just business expenses.

Fortunately, playing with What-If tables is easy. Simply enter the new expenses total in cell B5 (Current Expenses), open the What-If Table dialog box again, and click Generate (see Figure 27.10). Suppose, for example, that your total expenses add up to about 90% of your income. You must receive about a 3.5% increase (equivalent to inflation) just to keep up.

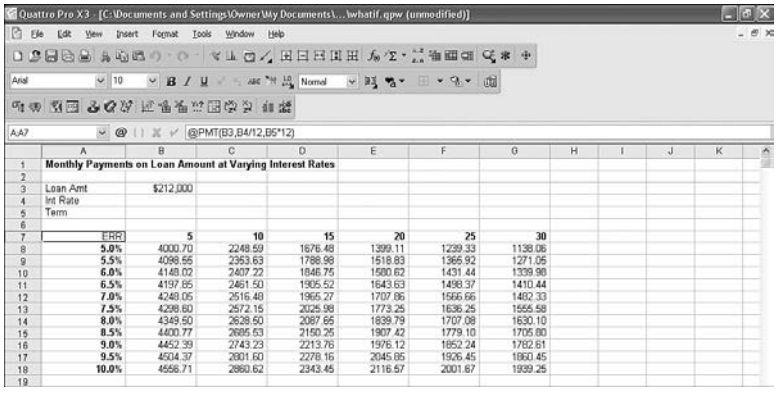
Figure 27.10
You can easily edit a What-If table by changing a variable and regenerating the table.



	A	B	C	D	E	F	G	H
1	Salary vs Inflation: Keeping Up							
2								
3		2006	Proj07	Proj08	Proj09			
4	Salary	58000	58000	58000	58000			
5	Expenses	52200	54027	55918	57875			
6	Net Increase	5800	3973	2082	125			
7								
8	% Inflation Rate	3.5%						
9								
10			Inc07	Net07	Inc08	Net08	Inc09	N
11	0% Salary Increase		58000.00	3973.00	58000.00	2082.06	58000.00	12
12		0.5%	58290.00	4263.00	58581.45	2663.50	58874.36	96
13		1.0%	58580.00	4553.00	59165.80	3247.86	59757.46	188
14		1.5%	58870.00	4843.00	59753.05	3835.11	60649.35	277
15		2.0%	59160.00	5133.00	60343.20	4425.25	61550.06	367
16		2.5%	59450.00	5423.00	60936.25	5018.31	62459.66	456
17		3.0%	59740.00	5713.00	61532.20	5614.25	63378.17	550
18		3.5%	60030.00	6003.00	62131.05	6213.11	64305.64	643
19		4.0%	60320.00	6293.00	62732.80	6814.86	65242.11	738
20		4.5%	60610.00	6583.00	63337.45	7419.50	66187.64	831
21		5.0%	60900.00	6873.00	63945.00	8027.06	67142.25	926
22		5.5%	61190.00	7163.00	64555.45	8637.50	68106.00	1023
23		6.0%	61480.00	7453.00	65168.80	9250.86	69078.93	1120
24		6.5%	61770.00	7743.00	65785.05	9867.11	70061.08	1216
25		7.0%	62060.00	8033.00	66404.20	10486.25	71052.49	1317
26		7.5%	62350.00	8323.00	67026.25	11108.31	72053.22	1417
27		8.0%	62640.00	8613.00	67651.20	11733.25	73063.30	1518
28		8.5%	62930.00	8903.00	68279.05	12361.11	74082.77	1620
29		9.0%	63220.00	9193.00	68909.80	12991.86	75111.68	1722
30		9.5%	63510.00	9483.00	69543.45	13625.50	76150.08	1827
31		10.0%	63800.00	9773.00	70180.00	14262.06	77198.00	1932

Two-variable What-If tables do exactly what the name implies: You can vary two values, but only in a single formula. For example, if you what to know what kind of mortgage payment you'll have based on varying interest rates and term of the loan, you simply create a single @PMT formula, but place that formula at the intersection of the two input variables. The formula itself references two blank variables cells (see Figure 27.11) and since there are not yet values in the referenced cells, the formula returns ERR.

Figure 27.11
Two-variable What-If tables use formulas where two variables are not yet determined.



	A	B	C	D	E	F	G
1	Monthly Payments on Loan Amount at Varying Interest Rates						
2							
3	Loan Amt	$212,000					
4	Int Rate						
5	Term						
6							
7	ERR	5	10	15	20	25	30
8	5.0%	4000.70	2248.59	1676.48	1399.11	1239.33	1138.06
9	5.5%	4098.56	2353.63	1788.98	1518.83	1365.92	1271.06
10	6.0%	4148.02	2407.22	1846.75	1580.62	1431.44	1339.98
11	6.5%	4197.85	2461.50	1905.52	1643.63	1498.37	1410.44
12	7.0%	4248.05	2516.48	1965.27	1707.86	1566.66	1482.33
13	7.5%	4298.60	2572.15	2025.98	1773.25	1636.25	1555.58
14	8.0%	4349.50	2628.50	2087.65	1839.79	1707.08	1630.10
15	8.5%	4400.77	2685.53	2150.25	1907.42	1779.10	1705.80
16	9.0%	4452.39	2743.23	2213.76	1976.12	1852.24	1782.61
17	9.5%	4504.37	2801.60	2278.16	2045.85	1926.45	1860.45
18	10.0%	4556.71	2860.62	2343.45	2116.57	2001.67	1939.25

To generate such a table, follow these steps:

1. Access the What-If Table dialog box (see Figure 27.12, which shows values already selected).

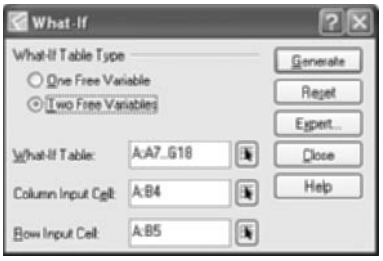


Figure 27.12
Use the What-If Table dialog box to select both variables in a two-variable What-If table.

2. Choose Two Free Variables as the table type.
3. Use the Range picker to select the table area.
4. Use the Range picker to select the input cell for the column of values. In this case, the column includes interest rate percentages. The cell that represents this value is the Interest Rate cell (B4).
5. Use the Range picker to select the input cell for the row of values. In this case, the row includes years (the formula multiplies the row times 12 to get the term in months). The cell that represents this value is the Term cell (B5).
6. Click Generate to display a chart that shows what monthly payments will be, based on variable interest rates and terms (refer to Figure 27.11).

USING CROSS TABS

The Cross Tabulation feature (or *Cross Tabs* for short) enables you to extract information from notebooks and databases and summarize the results in a report.

You can extract data from a notebook database using What-If tables, but you end up with static reports. The Cross Tab feature is much easier to use, and also gives you much more flexibility in updating the reports and performing other kinds of analysis.

In a simple example, suppose you keep track of regional results by month, total orders from the warehouse, totals sales, and profits (see Figure 27.13). Now you'd like to know how well each region has done for the quarter. You could manually create formulas to add up the figures, but using Cross Tabs makes the task much easier.

To create a Cross Tabs report of this type, follow these steps:

1. Create or identify the data you want to analyze.

2. Choose Tools, Data Tools, CrossTab, Report, or press Ctrl+T, or click the Create or Modify CrossTab Report button on the CrossTab Report toolbar. Quattro Pro first displays the Source Data Type dialog box (see Figure 27.14).

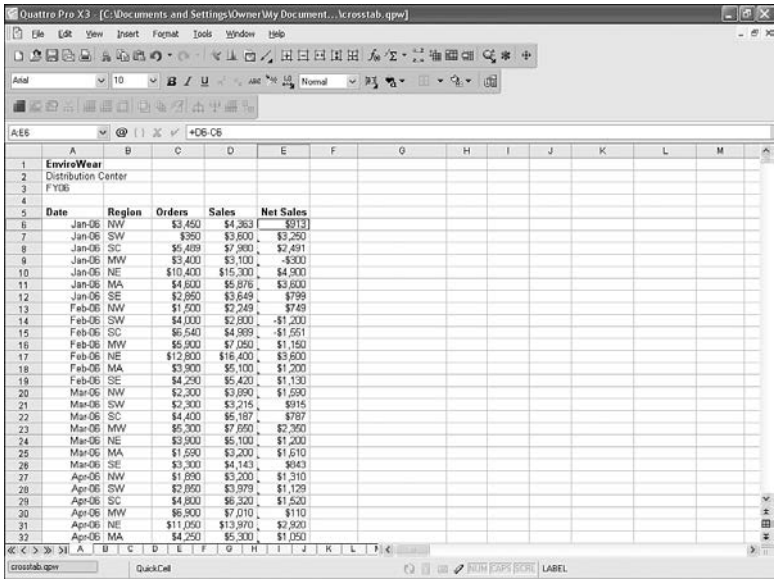


Figure 27.13
Cross Tabs reports help you summarize and calculate information in a more dynamic report format.

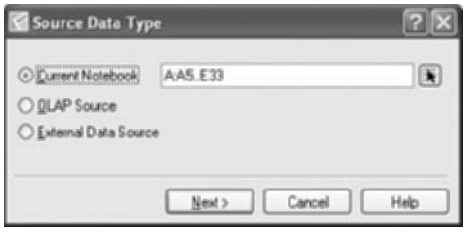


Figure 27.14
The data source for a Cross Tab report can be data in the current notebook, in another notebook, or in an external database.

3. Assuming you want to use data from the current notebook, use the Range picker to select the data, including any heading labels that may be present. Note that you could also use data from a database or another external source such as another notebook.

TIP FROM

Read Gilgen

If you select the upper-left cell of the block of data *before* choosing the Cross Tab feature, Quattro Pro likely can determine the block automatically.

4. Click next to display the CrossTab Report dialog box (see Figure 27.15).

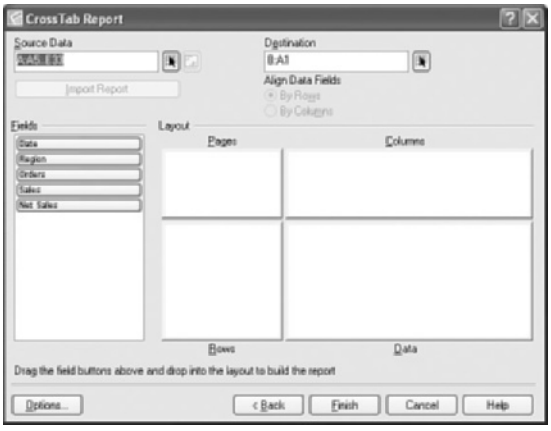


Figure 27.15
Use the CrossTab Report dialog box to set up the report.

5. Choose a destination for your report using the Range picker. By default, the report is placed starting at cell A1 on the next available blank sheet of the current notebook.
6. Drag the listed fields to the appropriate layout locations. For example, you probably want columns to display Date information, rows to display Region information, and the data itself to include a summary of Net Sales (see Figure 27.16).

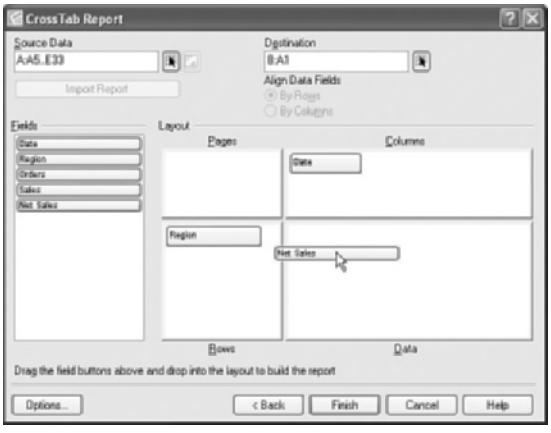


Figure 27.16
Using labeled data areas, you can easily drag data areas to the appropriate location on the report.

7. Click the Options button to display the CrossTab Options dialog box (see Figure 27.17).
8. Select the options you want; for example, in automatic row or column summaries, update the report each time you open it (if data from which it is generated has changed), and preserve data formatting. Click OK to return to the CrossTab Report dialog box.

Figure 27.17
Use CrossTab Options to preserve data formatting, among other options.

NOTE

> Preservation of data formatting may not be exactly what you expect it to be, whether by design or as a bug in Quattro Pro. For example, data that is formatted for currency does not generate currency formatting in the report. However, general data formatting such as alignment does seem to apply.

9. Click Finish to generate the Cross Tab report (see Figure 27.18).

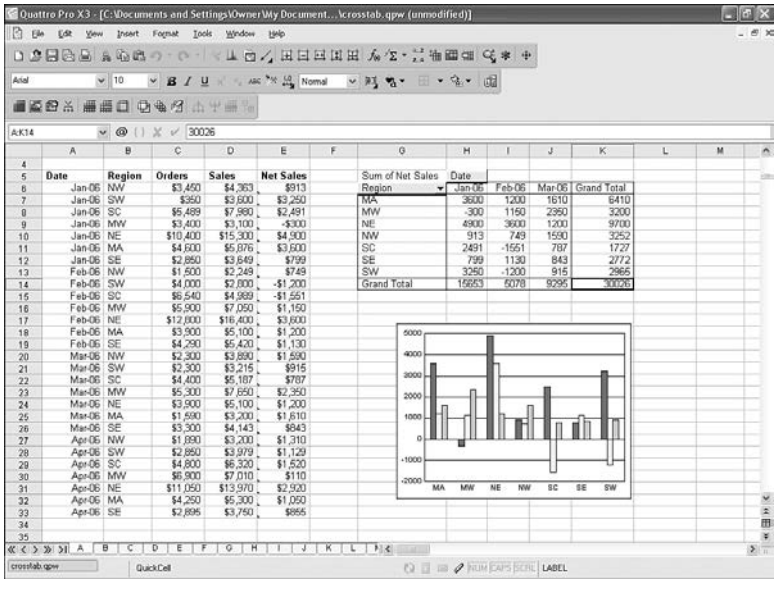


Figure 27.18
A completed Cross Tab report, summarizing regional sales.

Using the CrossTab Report toolbar, you can change display options, refresh the report (if underlying data has changed), or delete the report.

NOTE

To edit or remove a Cross Tab report, you *must* use the CrossTab Report toolbar or the Tools, Data Tools, CrossTab menu.

You can also modify the report to include different types of data and analysis. For example, suppose you want to see how sales are progressing from month to month, by region. You simply change the Field Options by following these steps:

1. Click anywhere inside the report to select it.

2. Click the Field Options button on the CrossTab Report toolbar, or choose Tools, Data Tools, CrossTab, Field Options. Quattro Pro displays the Field dialog box (see Figure 27.19, which shows options already selected).

Figure 27.19
You can modify an already generated report by accessing the Field Options dialog box.

3. Click the Data Position button (the third button from the left).
4. Make sure the Sum check box is selected.
5. Click the Compare button to expand the dialog box, which shows the Data Comparison area (refer to Figure 27.19).
6. Select Difference From, Date, [previous]. This lets you compare each date column with the previous date column.
7. Click OK and Quattro Pro displays the new report (see Figure 27.20). Note there are no figures for January because there is nothing to compare them against. Thus the report begins with February, in comparison to January, and so on.

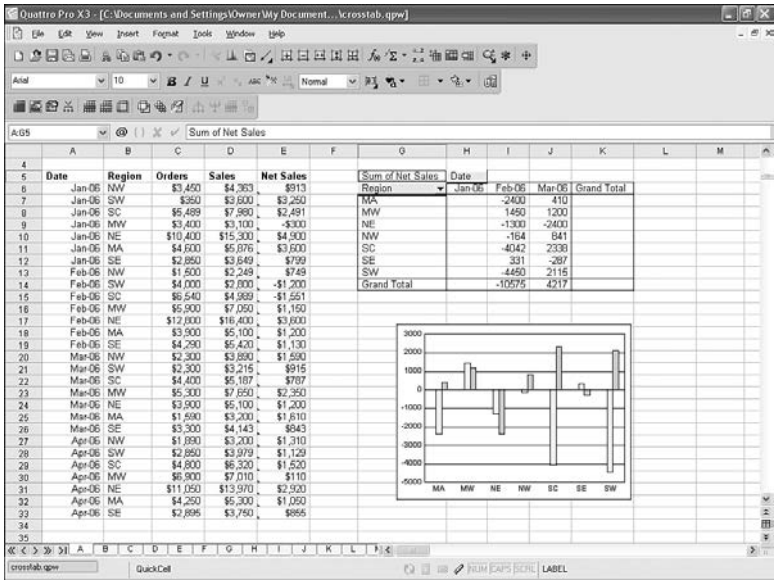


Figure 27.20
Among field options is the ability to compare data over time.

Finally, you can quickly create a chart to make the report more visual. Simply select all the region rows, including the region labels, click the Chart button on the toolbar, and click anywhere on the notebook page. Quattro Pro inserts a chart based on the data (refer to Figure 27.18).

USING THE ANALYSIS EXPERT

Whether you're a pro or neophyte, whether your success depends on analysis tools or you're just interested in answers, Quattro Pro's Analysis Expert may have just what you need to get correct answers quickly and elegantly.

The Analysis Expert includes three broad types of tools: Home, Numerical, and Statistical. This section takes a look at just two experts: Refinancing a Mortgage, and Calculating Rank and Percentile. Not only are these tools immediately useful, they can be illustrative of other uses for more experienced users.

NOTE

> Some Analysis tools prompt you for information and create notebook data, while others expect you to provide the data first. Thus, if you're new to this kind of analysis, it may take you some time to figure out how to create appropriate data and how to use some of these analysis tools.

REFINANCING A MORTGAGE

Whenever mortgage interest rates fall, everyone wants to refinance. Doing so could save you a bundle in the long run, but if you plan to resell soon, or if the transaction fees are particularly high, you might lose money by refinancing.

To determine just how useful refinancing can be, use the Mortgage Refinancing analysis tool by following these steps:

1. Choose Tools, Numeric Tools, Analysis Tools. Quattro Pro displays the Analysis Experts dialog box (see Figure 27.21).

Figure 27.21
The Analysis Tools Expert provides several useful predefined analysis tools for statistical, numerical, and home use.

TIP FROM

Read Gilgen

> The first time you use the Analysis Tools Expert, you might want to take a look at the different types of tools available. Just click a tool and Quattro Pro displays a brief description of what it does in the window at the left.

2. Select the Mortgage Refinancing Tool and click Next. In this tool, the Analysis Expert displays an input window (see Figure 27.22).

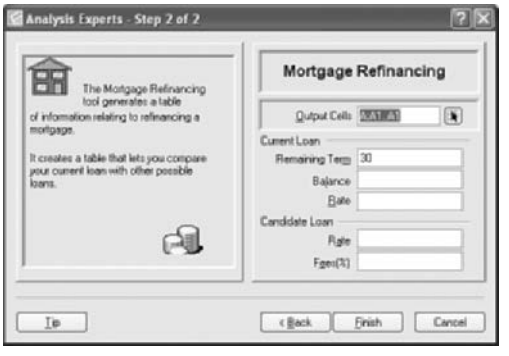


Figure 27.22
Use the Mortgage Refinancing Expert to determine if refinancing is worth the effort.

3. Enter the data for your current loan (for example, 30 years, balance of $200,000, and 7.0% loan rate).

NOTE

> Quattro Pro doesn't permit you to enter "$" signs. If you enter commas, the formulas will not work correctly. However, if you enter a percentage, you *must* enter the "%" sign, *or* enter a decimal equivalent, for example, .064 instead of 6.4%.

4. Enter the data for the candidate loan. The expert assumes the same loan period as for the current loan.
5. If you want to output the results somewhere other than the default location (Cell A1), use the Range picker to specify where.

TIP FROM

Read Gilgen

> Although you can output the expert's data in more than one location, you need not replicate the entire analysis. Instead, simply copy the New Lender row of the Candidate Loan section, and paste it beneath the first New Lender. You can make several New Lender rows and edit the data (term, rate, and fees) for each.

6. Click finish to create the analysis sheet (see Figure 27.23).

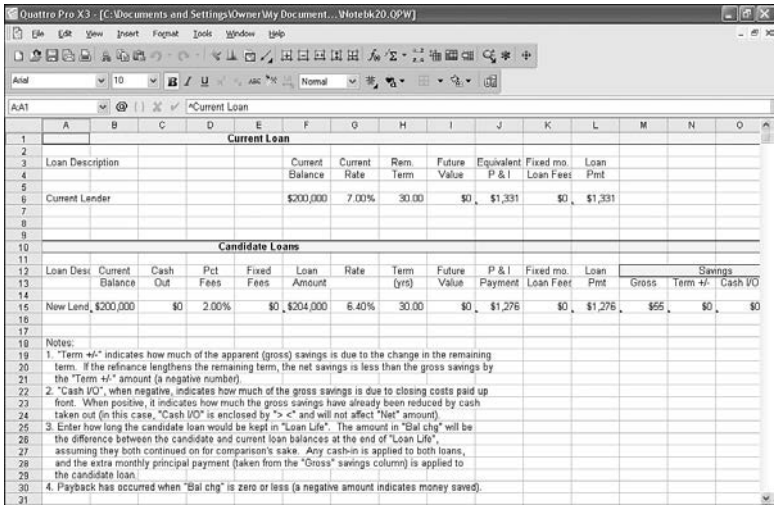


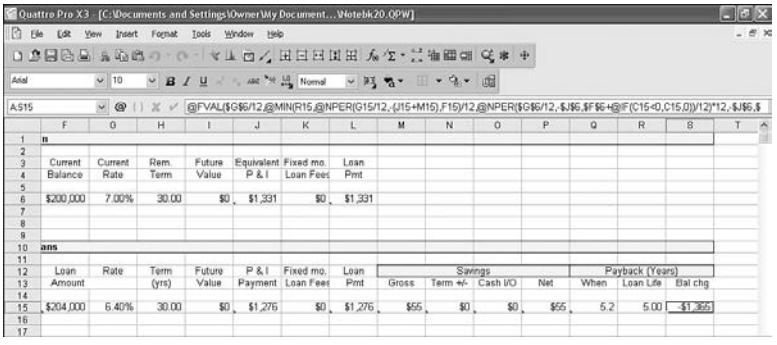
Figure 27.23
The Mortgage Refinancing notebook can be modified to reflect various scenarios.

The result is a complete analysis sheet that you can modify as you do any other spreadsheet. For example, you can replicate the New Lender rows, or change data in any of the relevant cells.

If you scroll to the right (see Figure 27.24), you can see how many years at the new rate it takes to recoup transaction fees. If you plan to sell soon, it may not be worth it to refinance. However, if you plan to stay in the house for some time, note that you can save a significant amount of money over the term of the loan. If you change the term of the loan, to 15 years

for example, you may still save money in addition to the 15 years of payments you don't have to make!

Figure 27.24
The Mortgage Refinancing notebook shows how many years it takes to break even after refinancing.



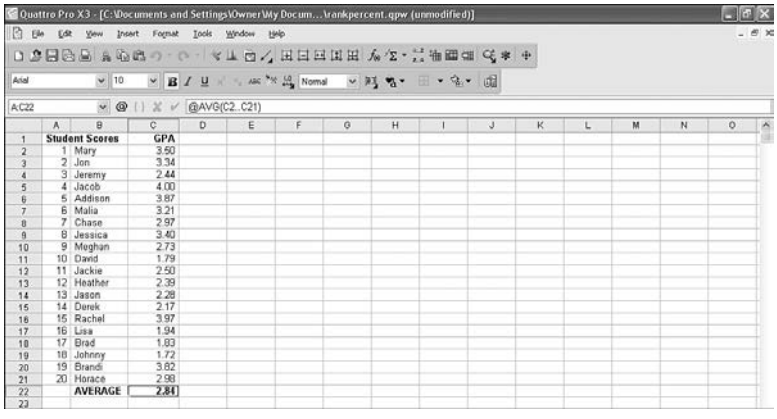
Finally, if you need convincing to let the Analysis Expert do the work for you, note the complexity of the formula in the Balance Change cell (refer to Figure 27.24).

CALCULATING RANK AND PERCENTILE

Perhaps you're a guidance counselor and want to know how the seniors at your school rank relative to each other. You want to know their exact place in the class, as well as their percentile ranking.

This sort of analysis requires that you prepare the data ahead of time. For example, you generate a list of names along with their cumulative GPA (see Figure 27.25).

Figure 27.25
You can rank a list of student GPA scores using the Rank and Percentile tool.



To create a rank and percentile list based on the data, follow these steps:

1. Choose Tools, Numeric Tools, Analysis Tools.
2. Select Rank and Percentile and click Next. Quattro Pro displays the Rank and Percentile dialog box (see Figure 27.26).

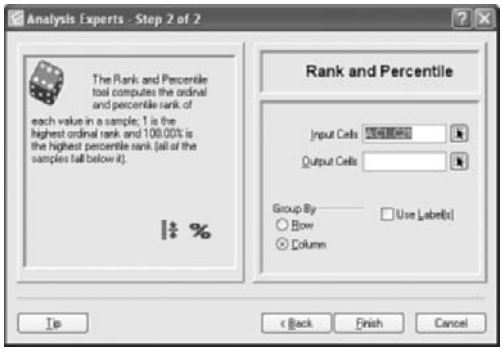


Figure 27.26
Use the Rank and Percentile tool to specify the data to be ranked.

3. Use the Range picker to select the block of data to be analyzed.

TIP FROM

Read Gilgen

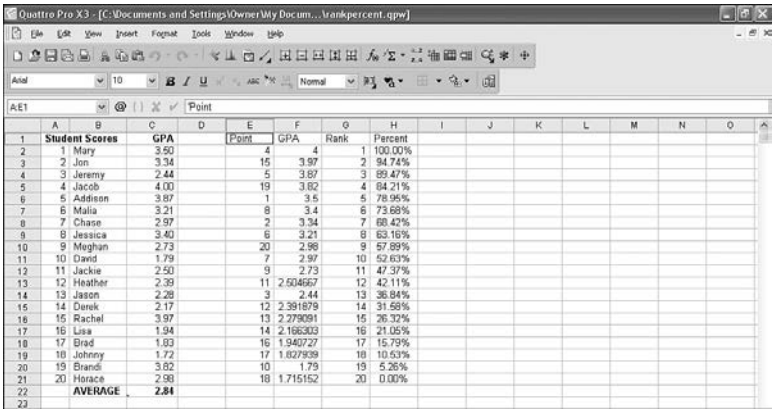
To better correlate the rankings with the original identifiable data, you might consider numbering the rows of data because a column of names does not appear alongside corresponding rank and percentile data. Numeric reference points do, however, and it's easy to identify which ranking belongs to which row of data.

NOTE

To determine rank and percentile, you need to analyze *only* the column of GPA scores. If you include other columns, such as names, each of those evaluates to zero and thus the results for that column are meaningless.

4. Use the Range Picker to specify the upper-left corner of the resulting data.
5. For this example, select Group By Column.
6. The Analysis Expert provides generic column headings, but if you select a column heading along with its data and choose to Use Label(s), Quattro Pro uses the label to head the resulting column of data.
7. Click Finish to produce the results (see Figure 27.27).

After producing the report, you can then sort by Point (a reference to a row of data), thus easily matching the rankings with individuals. You can also format or arrange the data in other useful ways.



	A	B	C	D	E	F	G	H
1	Student Scores		GPA		Point	GPA	Rank	Percent
2	1	Mary	3.50		4	4	1	100.00%
3	2	Jon	3.34		15	3.97	2	94.74%
4	3	Jeremy	2.44		5	3.87	3	89.47%
5	4	Jacob	4.00		19	3.82	4	84.21%
6	5	Addison	3.87		1	3.5	5	78.95%
7	6	Malia	3.21		8	3.4	6	73.68%
8	7	Chase	2.97		2	3.34	7	68.42%
9	8	Jessica	3.40		6	3.21	8	63.16%
10	9	Meghan	2.73		20	2.98	9	57.89%
11	10	David	1.79		7	2.97	10	52.63%
12	11	Jackie	2.50		9	2.73	11	47.37%
13	12	Heather	2.39		11	2.504667	12	42.11%
14	13	Jason	2.28		3	2.44	13	36.84%
15	14	Derek	2.17		12	2.391879	14	31.58%
16	15	Rachel	3.97		13	2.279091	15	26.32%
17	16	Lisa	1.94		14	2.166303	16	21.05%
18	17	Brad	1.83		16	1.940727	17	15.79%
19	18	Johnny	1.72		17	1.827939	18	10.53%
20	19	Brandi	3.82		10	1.79	19	5.26%
21	20	Horace	2.98		18	1.715152	20	0.00%
22		AVERAGE	2.84					

Figure 27.27
Ranking a column of data provides ordinal as well as percentile rankings.

TROUBLESHOOTING

YIKES! WHY IS MY LOAN SO HIGH?

When I calculate my loan, the loan amount seems astronomical. This can't be right, can it?

Generally you enter only numbers in input boxes. For example, $212,000 becomes only 212000. However, percentages are an exception. If you enter 7.5%, Quattro Pro interprets that to mean .075. If you just enter 7.5, Quattro Pro thinks you mean 750%. Quite a difference!

Whenever you enter percentage rates, either use the percent sign "%" along with the rate or convert the percentage to a decimal figure.

WHY DON'T MY WHAT-IF TABLES UPDATE?

I thought that changing underlying data for a What-If table updates the table too. Why isn't mine working?

Automatic is, perhaps, a relative term! What-If tables don't actually contain formulas, so you have to help. If you change the underlying or source data for a What-If table, you update the What-If table by choosing Tools, Numeric Tools, What-If, Generate.

CHAPTER 28

Graphing Data

In this chapter

by Read Gilgen

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Formatting Charts 718

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CREATING CHARTS

As useful as Cross Tab reports or filtered data sheets may be, sometimes it's easier to convey basic data concepts visually by using a chart. For example, a simple line chart quickly illustrates whether profits are rising or falling, without having to first interpret numbers in a table.

Fortunately, it's a breeze to create functional and attractive data charts using Quattro Pro.

CAUTION

> Although data charts can be useful, they can also be obnoxiously distracting. A poorly designed chart, for example, may highlight the wrong things, making it even more difficult for viewers to know what you're trying to convey, especially if you don't also provide the data.
>
> Before using a chart, make sure you know what you're trying to illustrate, and how various chart types work. Make sure the chart not only looks good, but helps the viewer interpret your data.

SELECTING THE DATA

Most Quattro Pro spreadsheets are far too large to represent adequately with a chart. Indeed, most charts summarize data, much like the data you find in a Cross Tab report. You can, of course, create a simple spreadsheet with just the numbers and labels you need, but why do that if the data already exists and if Quattro Pro can help you summarize it and chart it?

Consider the notebook in Figure 28.1. By using all of the data, the resulting bar chart is less than useful. However, the data chart based on a Cross Tab report of the same data begins to be useful because it summarizes sales by product description, and breaks down each by the type of material used.

➔ For more information on summarizing data using Cross Tab reports, **see** "Using Cross Tabs" **p. 700**.

After you determine just what data you plan to use for your chart, Quattro Pro offers two approaches to selecting the data and creating the chart.

The first is the simplest, but also offers the least control over the initial result. Simply position the cursor anywhere in the data and click the Chart button on the toolbar. Nothing happens until you click on the notebook sheet where you want to insert the chart, whereupon Quattro Pro creates a simple bar chart as an object (refer to Figure 28.1). If you have fewer than three columns of data, Quattro Pro generates a pie chart.

If Quattro Pro doesn't automatically select the correct parts of the data, first select the exact data and labels you want to include, and then do the same thing: Click the Chart button and then click on the notebook page where you want to insert the chart.

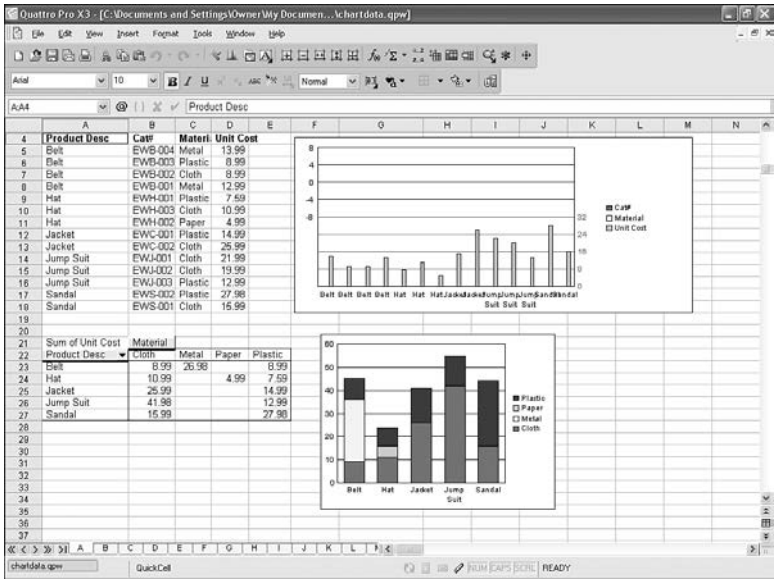

Figure 28.1
Good charts represent summary data, not extensive ranges of data.

NOTE

> Initial results using either method of creating a chart probably won't be entirely satisfactory. However, you modify the chart after you create it, as described in this chapter.

The second method involves using the Quattro Pro Chart Expert, which steps you through the process of selecting the data and making choices about what the chart is to look like.

To use the Chart Expert, follow these steps, after making sure you have appropriate data to work with:

1. Position the cursor anywhere in the data table.
2. Choose Insert, Chart. Quattro Pro displays Step 1 of 4 of the Chart Expert (see Figure 28.2). Choose from the following options:

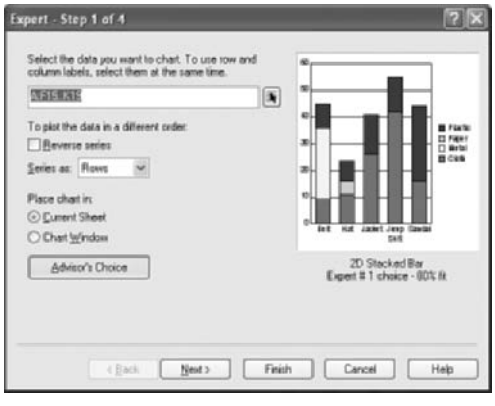

Figure 28.2
The Chart Expert assists you in selecting the data and options for creating a chart.

- If the data range selected isn't correct, use the Range picker to select the block that should be included in the chart.
- If the range order isn't correct, you can Reverse the Series, which simply means the last data series appears first. This can be useful if larger elements of one series cover small elements of another series, for example, in an area chart.
- You can place the chart in the current notebook sheet, or you can open the chart in a separate editing window.

3. Click Next to display Step 2 (see Figure 28.3). Choose from the following options:

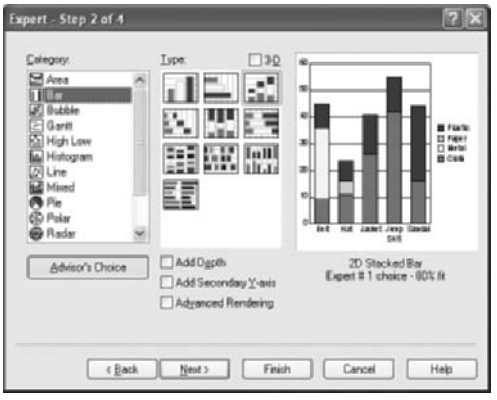

Figure 28.3
Choose a chart category and type that best portrays your data.

- **Category**—Quattro Pro offers a variety of charts, including bar, area, bubble, Gannt, Line, Pie, Radar, and so on.

NOTE

> You can find basic chart category descriptions by going to Help, Contents, Presenting Spreadsheet Data in a Chart, Reference: Presenting Spreadsheet Data in a Chart.

➔ Although the procedures for creating and working with data charts are considerably different in Quattro Pro and Presentations, both offer most of the same kinds of charts. For examples and information on what different charts are for, **see** "Creating Data Charts", **p. 824**.

- **Type**—Each type of chart also has various ways it can be displayed. Click each type to see how it differs from the others.
- You can also choose to display the chart with depth, in 3-D, or with advanced rendering (for example, professional-looking gradient shading of data series elements).
- **Advisor's Choice**—The Chart Expert's "advisor" tries to determine the best type of chart based on the data it sees. Click this button to see the Expert's advice. You can always change things back again later.

4. Click Next to advance to Step 3 (see Figure 28.4), where you can add titles, subtitles, X- or Y-axis titles, or a footnote.

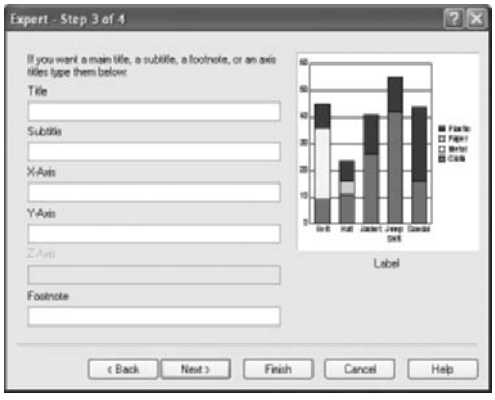

Figure 28.4
Titles, especially X- or Y-axis titles, can make charts much easier to understand.

5. Click Next to advance to Step 4 (see Figure 28.5), where you can choose a different color scheme. Click various schemes to see what's available, and select one, or select No Change.

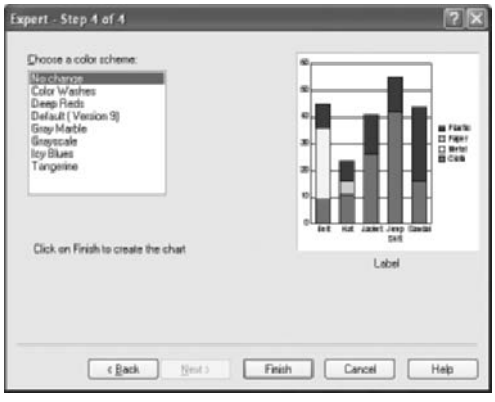

Figure 28.5
Color schemes help you make color-coordinated changes to all elements of your chart.

6. Click Finish. If you chose to place the chart in a new window, you're done, and Quattro Pro creates a separate window for the chart (see Figure 28.6).
7. If you chose to place the chart in the current notebook sheet, click the mouse pointer at the upper-left corner of where you want the chart to appear. Quattro Pro inserts the chart alongside your data.

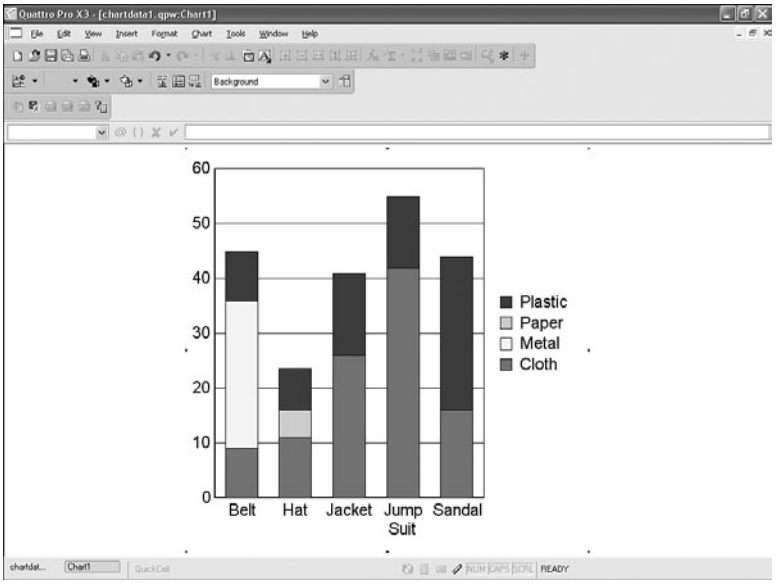

Figure 28.6
Viewing the chart in a separate window makes it larger and easier to see. Quattro Pro saves this chart on the Objects sheet of the notebook.

NOTE

Creating a chart in a separate window helps you see the chart more clearly, although at first glance it appears that you cannot save that view along with your notebook.

However, Quattro Pro saves such separate objects on a special Objects sheet, which appears following all of the regular Quattro Pro sheets.

If you open a Quattro Pro notebook that you know has a chart, or other objects, just click the >| (Quickly Move to/from Objects Sheet) button at the lower left of the screen. Find the object you want to view, for example, the chart, and click it to open it in full screen view.

To return to the data screen, click the |< (Quickly Move to/from Objects Sheet) button at the lower left of the screen.

If you can't see some of your data in a 3-D or area chart, see "Where's My Data?" in the Troubleshooting section at the end of this chapter.

EDITING THE CHART CONTENTS

The really cool thing about Quattro Pro charts is that once you create them and have them relating to the data the way you want them to, you can change the source data and the charts automatically update.

Consider the following possibilities:

- You created from scratch the table of data upon which the chart is based. Simply change a data cell in the source data and Quattro Pro automatically updates the chart.

- The chart is based on a CrossTab report that in turn is based on notebook data. Modify the notebook data; then position the cursor in the report and choose Tools, Data Tools, CrossTab, Refresh. Quattro Pro updates the CrossTab report which in turn updates the chart.

The bottom line is that whenever you change the source data for a chart, the chart automatically reflects that change.

ADDING OR DELETING A DATA SERIES

Another interesting modification you can make to a chart is to add or delete a data series (column of data). However, the chart refers specifically to the original locations of the data, so if you insert columns of data, you also have to modify the chart to include all columns or rows.

Suppose, for example, that you just added a new line of swimsuits this year. To update your chart, you follow these steps:

1. Insert a column by right clicking a column letter and choosing Insert Cells. Quattro Pro moves the data aside to make room for the new column.
2. Add the label and data for the new column (see Figure 28.7). Note, however, that although the new data automatically appears in the chart, the rightmost column of data (Sandals) no longer does.

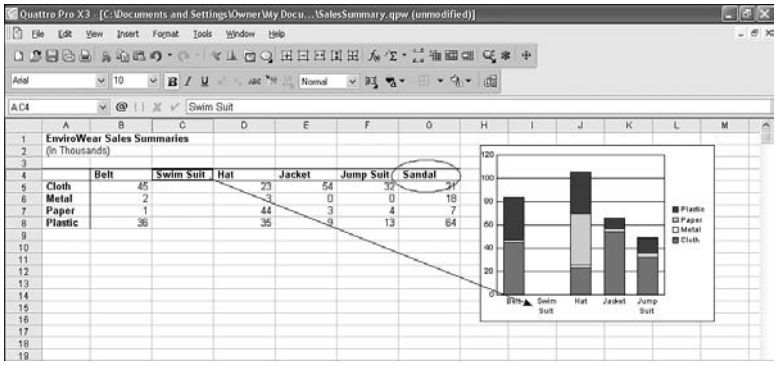

Figure 28.7
Inserting or deleting columns of data also automatically changes the chart generated from that data.

3. Right-click the chart and choose Source Data. Quattro Pro displays the Source Data dialog box and the new Y-Range (the range of columns) has automatically grown to include all the columns.
4. Click OK to update the chart area and include all the columns in the chart.

FORMATTING CHARTS

Your primary objective, obviously, is to make sure your chart accurately represents your data. A close secondary objective is to make the visual representation easy to understand.

In addition, Quattro Pro offers a variety of ways to format, or enhance, your charts for presentation in a boardroom, in print, or on the Web.

CHANGING THE CHART TYPE

If you used the Chart Expert to create your chart, you had an opportunity to choose the type of chart you wanted. If you used the Chart button on the toolbar, you got whatever Quattro Pro offered you, which for three or more columns of data is a standard bar chart (see Figure 28.8).

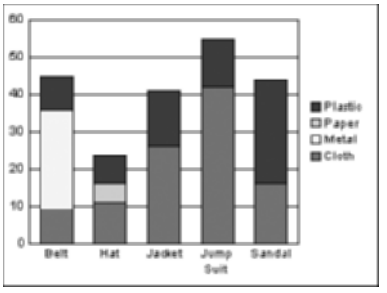

Figure 28.8
A standard bar chart might work, but more likely you need to choose a more appropriate chart than what Quattro Pro automatically generates.

You can change the chart category and type by accessing the Chart Gallery. Click a blank area of the chart (so that a hashed border appears around the chart), and choose Chart, Gallery. You can also click the Specify the Chart Type button on the toolbar that appears when you click the chart. Quattro Pro displays the Type tab of the Chart Type Gallery (see Figure 28.9).

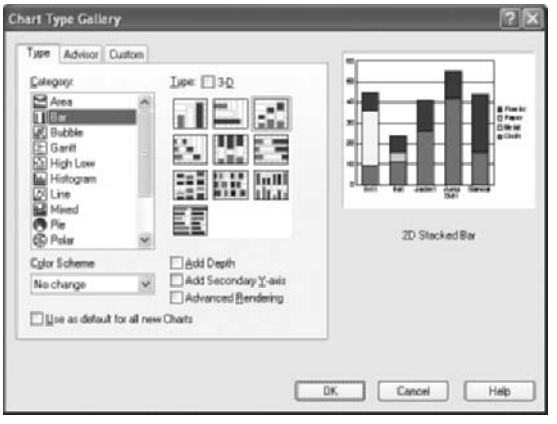

Figure 28.9
Choose different categories and types of charts from the Type tab of the Chart Type Gallery.

The main Chart Type Gallery is similar to what you see when you use the Chart Expert. You can select a category, a type within that category, and choose other options such as 3-D, Add Depth, or Color Scheme.

What makes this approach to the Gallery different are the other two tabs.

Click the Advisor tab to display suggestions based on the type of data the advisor sees (see Figure 28.10). For example, the stacked bar might be more appropriate than the standard bar chart.

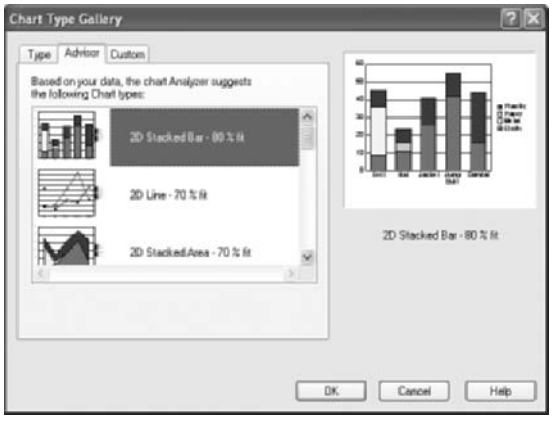

Figure 28.10
The Advisor tab of the Chart Type Gallery makes suggestions for a type of chart based on the data it sees.

Click the Custom tab to explore other predefined layout options (see Figure 28.11). You can create most of these options yourself, but you just might find something here that already fits the bill.

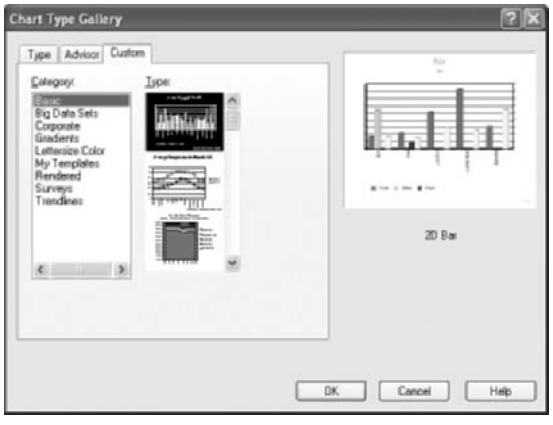

Figure 28.11
The Custom tab of the Chart Type Gallery lists predefined special layouts.

ENHANCING A DATA SERIES

You want to make sure your viewers or readers can distinguish the graphic representations of each data series (for example, Product Types). Where you can use color, the default series properties often work well. However, certain situations might call for changing the properties of a data series.

- Some viewers might have color blindness, which is more common than most of us realize. Placing a green and a red bar next to each other, for example, might be indistinguishable.
- If you plan to print your chart in black and white, for example, on an overhead transparency, you have to realize that gray shading of some colors is nearly identical. Blue and Red, for example, appear nearly black, while yellow and light blue are nearly the same shade of gray.
- Other changes you make to a data series might be purely for aesthetic reasons, or to highlight one series over all the others.

To modify the properties of a data series, you simply click the chart to edit it (the hash mark border appears); then double-click one of the data series. Quattro Pro highlights all of the same color elements in the series and opens the Series Properties dialog box (see Figure 28.12).

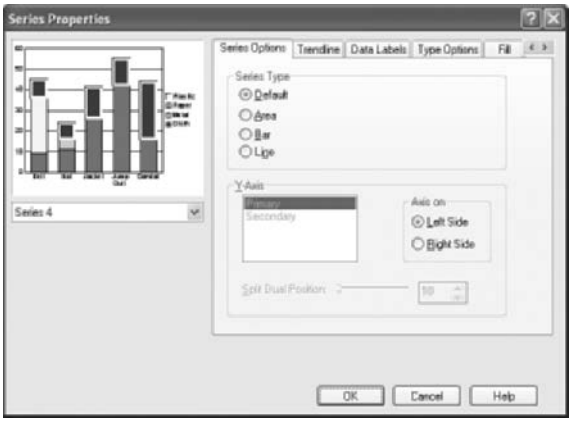

Figure 28.12
The Series Properties dialog box helps you change colors, fill patterns, and shapes of elements in the same series.

NOTE

Accessing the Series Properties dialog box can be tricky. If you click once, and then double-click, you get the Data Point Properties dialog box, which modifies only one of the series.

You can select a data series, and then right click and choose Series Properties from the QuickMenu if you have difficulty double-clicking and getting what you want. You can also click the Property Selector button on the property bar to display the dialog box for the chart element you have selected.

If you seem to be able to edit only one data point at a time, see "Why Can't I Change More Than One Data Point at a Time?" in the Troubleshooting section at the end of this chapter.

The various tabs of this dialog box help you distinguish this series from all the others. As you make choices, Quattro Pro displays a preview at the left of the dialog box (see Figure 28.13, which shows several options already selected). Tab options include

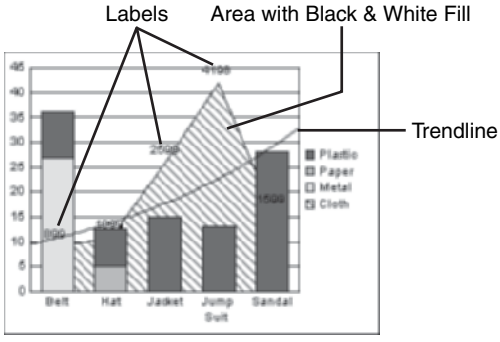

Figure 28.13
Contrasting series and using other options in the Series Properties dialog box can help make important data stand out.

- **Series Options**—You can change the series type to stand out compared to other series. For example, click Area to show the selected series as an area chart, contrasting with the bars of the other series.
- **Trendline**—In addition to the series marker itself, you can select the method by which you show a trend from one data point to another within the series (refer to Figure 28.13). You can also show equations or adjust the data series to match the trendline.
- **Data Labels**—You can choose to display the data represented by the series data points, including values and legends, and where the labels appear.
- **Fill**—This option can be of most importance if you're trying to find a method for displaying the chart more clearly in black and white. Choose a pattern that contrasts with other series patterns and choose black and white colors. You can also fill a data series with gradient shades, textures, or pictures.
- **Line**—Choose whether the series has an outline or not, and if so, how thick, what style, and what color.

By modifying one or more data series, you can draw attention to the information that's most important, while leaving the less important series alone.

CHANGING OTHER PROPERTIES

The way a chart looks is largely a matter of personal taste. That's why Quattro Pro's chart properties options are so appealing. The following are some of the ways you can modify Quattro Pro charts:

CAUTION

Myriad options can be a siren temptation for those new to creating data charts. However, using options just for the sake of trying everything is not a good idea. You're better off determining which options will help you communicate more clearly and stick with those. Generally less is more.

TIP FROM

Read Gilgen

Although there may be ways to access Properties dialog boxes using menus or the toolbar, the easiest way to get there is by double-clicking the object you want to change while in the Chart Editor, or by selecting the object, right-clicking, and choosing from the QuickMenu.

- **Legends**—In Chart Edit mode, double-click the Legend to display the Legend Properties dialog box (see Figure 28.14). You can choose to display the legend or not, specify where to place it, and change the box style and fill.

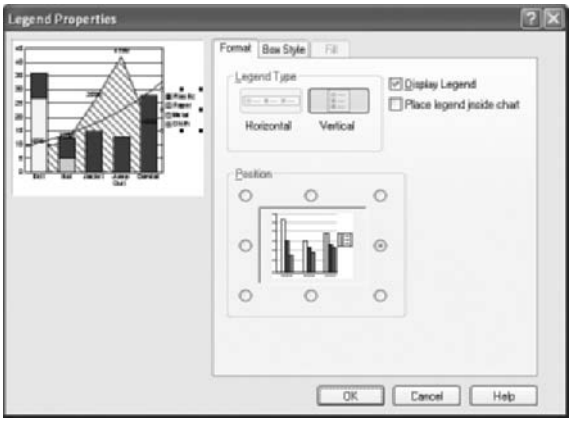

Figure 28.14
Legends are often key to understanding what chart elements represent.

- **Frame**—The Frame Properties dialog box enables you to change the line style and fill of the framed area of the chart.
- **Axis Properties**—In the Axis Properties dialog box, you can adjust how Y- or X-axis information is displayed (see Figure 28.15). For example, on the X-axis, you can display every other label, while on the Y-axis you can adjust the scale to display (for example, the scale starts at 75 and goes to 100). For either you can add grid and tick marks and specify where the axis information appears.
- **Text**—In the Text Properties dialog box, you can change the font or text box style. Of particular interest may be the Position tab (see Figure 28.16) where you can rotate text, which is useful for displaying labels along the X-axis.

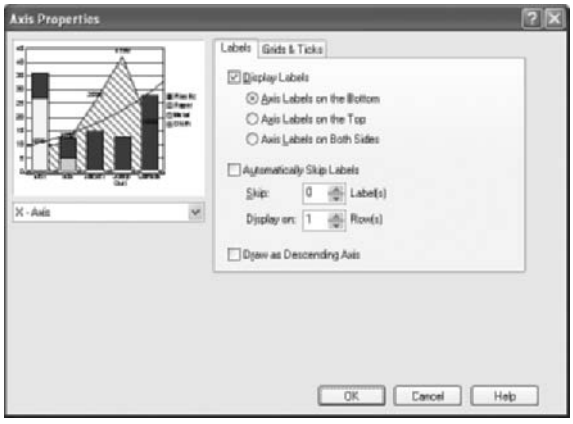

Figure 28.15
Axis properties help simplify chart element descriptors and thus make it easier to understand what the chart is all about.

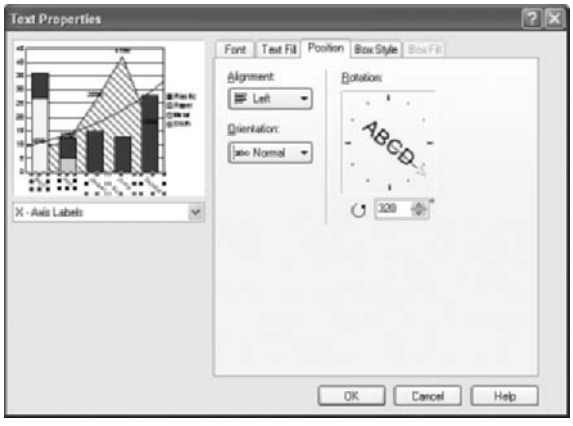

Figure 28.16
Rotating X-axis labels makes it possible to include the text for each label instead of having to shorten or hide labels.

ADDING OBJECTS TO A NOTEBOOK SHEET

Like you can with any WordPerfect or Presentations document, you can also add graphic images and multimedia elements like movies and sounds to a Quattro Pro notebook.

Although you may have to search for the logic behind adding movies, adding graphic images can be very useful in creating a well-presented notebook.

Consider these possibilities:

- You can choose Insert, Shape, and choose a graphic shape to add to your notebook. For example, you could draw an arrow from a cell of data to the part of a chart that represents that cell.
- You can choose Insert, Graphics, and choose to add clip art, images from files (including photographs), Text Art, or make your own drawing.
- If you're partial to data charts you create in Presentations, you can create a chart in Presentations and copy and paste it into Quattro Pro.

Be aware that added objects lie on top of the notebook data, and thus cover it. Although you can change the layer order of added objects, you cannot move them behind cells and their contents.

➔ For more information on working with graphic images, **see** "Adding Graphics to Your Document," **p. 307**.
➔ For more information on adding clip art and other drawings, or on using multimedia elements, **see** "Working with Graphic and Multimedia Elements in Presentations," **p. 795**.
➔ For more information on Presentations data charts, **see** "Creating Data Charts," **p. 824**.

PRINTING CHARTS

Besides being able to print a notebook document along with its accompanying chart, you can also print just the chart.

To print a Quattro Pro chart, follow these steps:

1. Select the chart you want to print.
2. Choose File, Print.
3. Select Selected Chart.
4. Click Print Preview if you want to see what the chart will look like before you print it.
5. Click Print to print the chart.

You can, of course, also change the page setup and other printing options.

TROUBLESHOOTING

WHERE'S MY DATA?

When I create a 3-D bar chart, some of my data doesn't show up. Why not?

First, make sure you selected all the relevant data before creating the chart. If you inadvertently exclude data, it won't appear in the chart.

Second, make sure the data series with the largest numbers appears along the back of the 3-D chart, and that series with smaller numbers appears along the front. This may be as simple to fix and reversing the order of the series (using the Chart Expert). However, you may also have to manually rearrange columns of data before generating your chart to make sure larger numbers are in the back.

WHY CAN'T I CHANGE MORE THAN ONE DATA POINT AT A TIME?

When I try to edit the properties of a data series, my changes only apply to one data point, not to all. Do I have to change each point one by one?

When editing a chart, if you single-click any element of a series, you select all of the elements of a series. However, double-clicking a single element while all are selected actually changes the selection to a single element and opens the Data Point Properties dialog box. Instead, don't select the series first. Just double-click a series, or make sure a single data point is selected and double-click to reselect the entire series and open the Series Properties dialog box.

CHAPTER 29

Exploring Quattro Pro's Advanced Features

In this chapter

by Read Gilgen

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Creating Push Button Macros 740

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If WordPerfect by itself can fill the pages of an entire book, the same holds for Quattro Pro. In fact, for many of us, the whole idea of working with numbers and formulas is rather daunting and the first few chapters of this section on Quattro Pro will suffice. For some the idea of taming numbers is intriguing, and you'll want to do some additional exploring and learning. However, if you're already an expert in these matters, we can only provide a taste of what Quattro Pro has to offer. We'll leave it up to you to explore features, help screens, and even additional books beyond this one.

That said, let's jump in and take a look at just a few features that hint at the power Quattro Pro has to offer you. There is no theme here, and we'll jump from one topic to another, often with little or no transition.

PROTECTING NOTEBOOK DATA

The importance of keeping data secure from prying (or spying) eyes varies depending on your environment. Complex calculations used for bidding a multimillion dollar project needs greater safeguards than, say, my personal budget.

Fortunately, Quattro Pro provides several levels of data protection.

CAUTION

> Remember that any data worth having is also worth protecting by backing it up. Make sure that you have more than one copy of a spreadsheet, even if it's your personal budget. Further, keep that second copy somewhere other than on the same hard drive.
>
> The best protection for your data is your own common sense.

LOCKING CELLS AND OBJECTS

One simple level of protection is to guard against tampering with formulas by your own personnel. If you work hard to create just the right formulas, you don't want others, or even yourself, to change them accidentally. Instead, you can protect cells that you don't want changed, or even lock all cells except those where users should enter data.

To lock all spreadsheet cells, follow these steps:

1. Prepare the notebook exactly the way you want it to work, and save it.
2. Choose Format, Sheet Properties.
3. Click the Protection tab (see Figure 29.1).
4. Select Enable Cell Locking to lock all the cells in the current sheet.
5. If you have other graphic or chart objects you don't want moved, deleted, or modified, check Enable Object Locking.
6. Click OK to return to the notebook.

Figure 29.1
The Protection tab of the Sheet Properties dialog box enables you to lock, or protect, all cells in a worksheet.

Unfortunately, this completely locks the notebook, making it impossible to do anything other than look at the data. If you also want to allow certain cells to be changed, follow up with these steps:

1. Select the cell or cells you want to unlock.
2. Choose Format, Selection Properties.
3. Click the Constraints tab (see Figure 29.2).

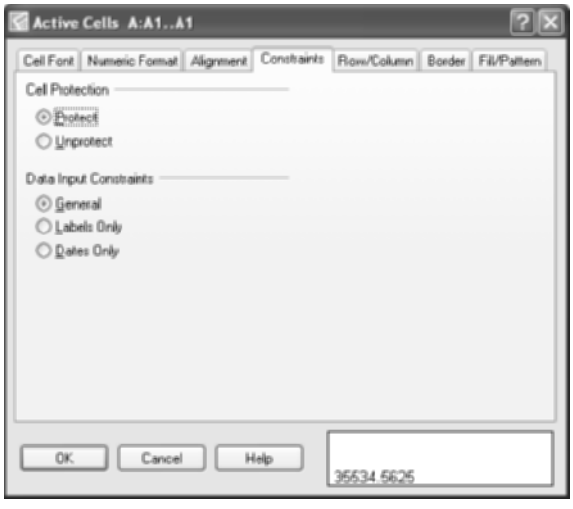

Figure 29.2
The Constraints tab of the Selection Properties dialog box enables you to lock or unlock cells or groups of cells.

4. Choose Unprotect to unlock the selected cells.
5. Click OK to return to the notebook.

Note that you can also use this method for selecting and protecting (locking) only certain selected cells, without protecting the entire sheet.

If you try to enter data in a locked cell, or the incorrect type of data in a constrained cell, Quattro Pro beeps at you and tells you the cell is protected.

To turn off locking, either to the entire sheet or to selected cells, follow the preceding steps and choose the option that turns it off.

NOTE

> Quattro Pro's locking/constraining features do not protect against willful tampering with a spreadsheet because anyone can turn off protection. However, it does prevent users from making accidental changes, such as entering data in a cell that contains a formula.

PASSWORD PROTECTION

If your data really is sensitive, you can protect the contents of your notebooks by following these steps:

1. Create and save, or open the notebook you want to protect.
2. Choose Format, Notebook Properties, or press Shift+F12.
3. Click the Password Level tab (see Figure 29.3).

Figure 29.3
Use the Password Level tab of the Notebook Properties dialog box to set password protection for a Quattro Pro notebook.

4. Choose one of the following password level options:
   - **None**—Anyone that has access to the file can open it.
   - **Low**—Anyone can open the file, and see results, but they cannot see or modify the formulas. This has the same effect as locking all cells that contain formulas. Cells that determine the results of the formula can be changed, and the results do appear in the formula cells.

- **Medium**—Notebooks saved at this level require that Quattro Pro be started using a command-line *switch* (argument in the command line). For example, if you wanted to open a file named "envirowearplan.qpw," and had given it medium protection with the password "recycle," you would need to start up Quattro Pro by clicking the Windows Start button, choosing Run, and typing the following:

  ```
  qpw.exe /srecycle "[drive:]\[full_pathname]\ envirowearplan.qpw"
  ```

  (No space between /s and the password, and quotes around the path and filename.)

TIP FROM

Read Gilgen

> Although medium-level protection seems rather difficult to use, it can actually save you time while affording protection to your data.
>
> For example, if the file is on a network drive, you can create a shortcut on your own desktop that starts up Quattro Pro and the file using the /s switch. For you, it's just a double click of the shortcut to open the file. To others who might have access to the file on the network, they cannot open it because they do not have the password.

- **High**—This is the most traditional of password methods because anyone who opens the file, including you, must provide the correct password.

CAUTION

> If you use a high-level password, be sure to remember it. If you forget it, there is no way to open the file.

- **Edit with Controls Only**—Notebooks thus protected allow users to input data only through forms controls, such as buttons, check boxes, and so on.

5. Click OK and Quattro Pro displays the Enter Password dialog box.
6. Type a password, which is case-sensitive, press Enter, and type the password again to verify it. If it doesn't match what you typed the first time, Quattro Pro will tell you that passwords don't match, and you have to start over again.
7. Save the file to save the password along with the file.

Finally, once you open a password protected file, you can change the password level only if you can also provide the password. This prevents someone from sneaking into your office and changing a password on a file you forgot to close!

USING ADVANCED EXPERTS

Even if you're not a Quattro Pro guru, you're in luck because lots of folks out there are, and many of them provide spreadsheet templates either free or for purchase that can help you perform amazingly complex tasks.

Quattro Pro X3 includes a handful of such templates that not only are helpful, but that can give you a sense of what's possible in a spreadsheet. As you'll see, spreadsheets aren't just for adding and multiplying!

USING THE RETIREMENT INCOME PLAN PROJECT

Not that *your* retirement is imminent, but most of us hope to have some sort of plan in place so that we can enjoy our later years. Sorting out all the complex relationships between income, pension, Social Security, investments, and inflation can be a pretty daunting task.

To use a Quattro Pro project (for example, the Retirement Income Plan), choose File, New from Project. Quattro Pro displays the Perfect Expert dialog box, which lists a variety of interesting and useful spreadsheet-based projects (see Figure 29.4).

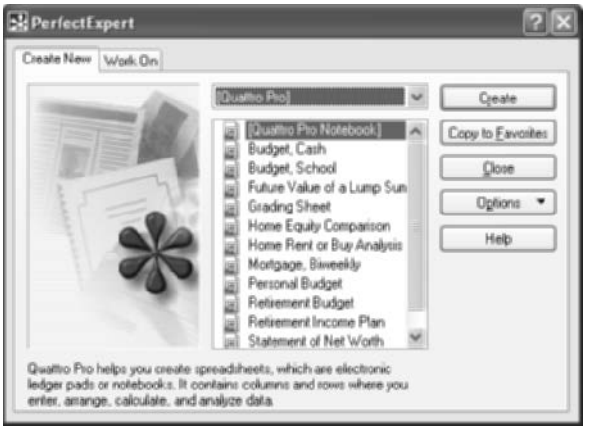

Figure 29.4
Quattro Pro comes with a variety of useful spreadsheet projects.

Scroll through the list to find the project you want, select the project, and click Create. Quattro Pro displays the project template (see Figure 29.5).

NOTE

> Quattro Pro typically asks if you want to Disable or Enable Macros because macros from untrustworthy sources might threaten your computer's security. Because Quattro Pro's macros (found in its templates) can be trusted, and because virtually no one creates malicious macros from Quattro Pro, not only should you enable the macros, but you can tell Quattro Pro not to ask any more.

The creator of this project has used cell background colors to help you identify the areas in which you enter numbers. Thus, you simply move from one colored area to the next and type the figures that represent your financial facts and assumptions. For example, you tell the project how long you expect to live (years left in your life, not total age when you die), or what kind of salary increases you expect before you retire (in percentages). Don't forget to enter percentages with a percent sign, or as a decimal (for example, 3% or .03).

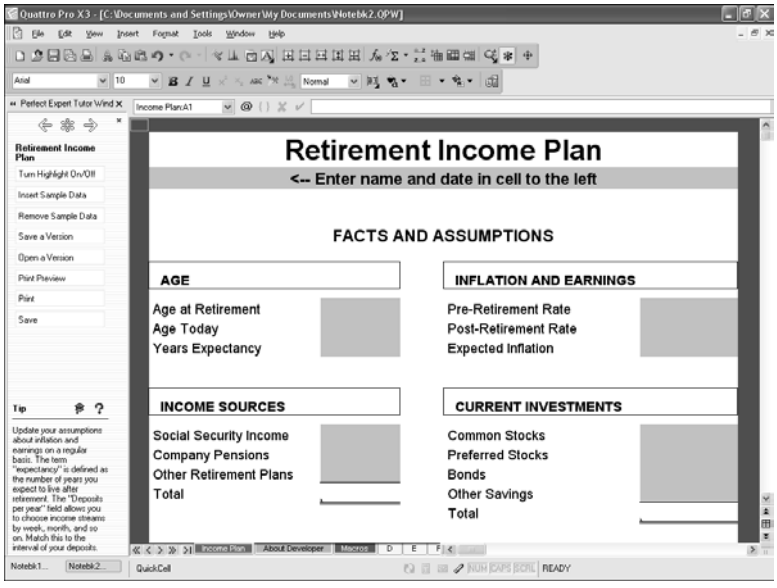

Figure 29.5
Quattro Pro project templates themselves may be complex, but they simplify your work.

Finally, after you tell Quattro Pro how much annual income you hope to have at your disposal, Quattro Pro figures out how much additional money you need to save or invest on a weekly basis between now and the time you plan to retire. You might be surprised (or shocked) at the results. However, if you don't like the results, it's not Quattro Pro's fault. Instead, you need to adjust resources or expected annual income and then set out to accomplish your plan.

EXPLORING THE RETIREMENT INCOME PLAN TEMPLATE

The scope of this book doesn't allow us to fully explore a complex template such as this one. But we can take a "peek under the hood" and see what kinds of things control what we see on the surface.

AUDITING FORMULAS

The first thing you can do is to use Quattro Pro's Auditing functions to see how various cells and their formulas interact with each other (see Figure 29.6, which shows precedence and dependence already displayed). For example, if you select the Estimated Income cell (F31) and choose Tools, Auditing, Trace Precedents, you find that the cell simply reports the contents of cell C19. If you choose Tools, Auditing, Trace Dependents, you find that cell F32 depends on the information found in cell F31.

TIP FROM

Read Gilgen

If you're doing a lot of checking, it's a good idea to display the Auditing toolbar. Simply choose Tools, Auditing, Show Auditing Toolbar. You can turn it off again after you're through.

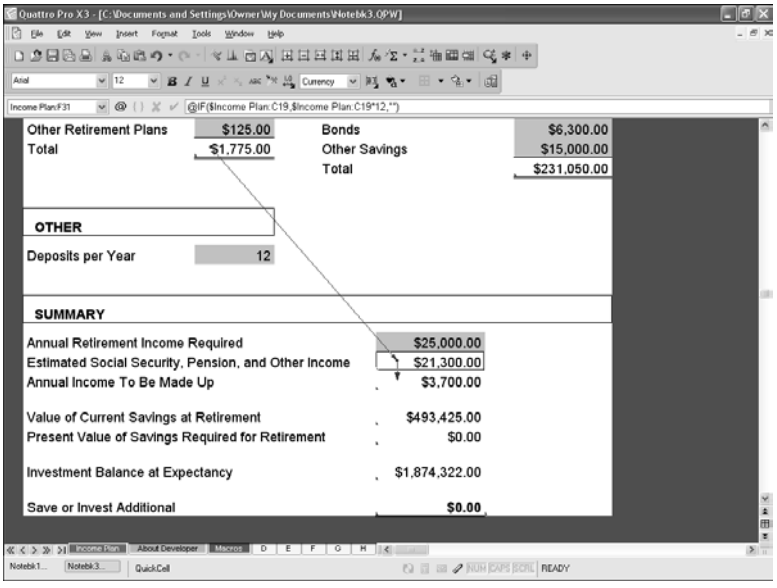

Figure 29.6
Quattro Pro's auditing tools help you see how cells and their formulas relate and interact with each other.

If you select cell F35 (present value of savings required for retirement) and show Precedents, you'll note that not only does the cell require the value found in cell above it, but also links to a table on the macro page. Single-click the link icon and Quattro Pro displays the two cells that provide information (see Figure 29.7).

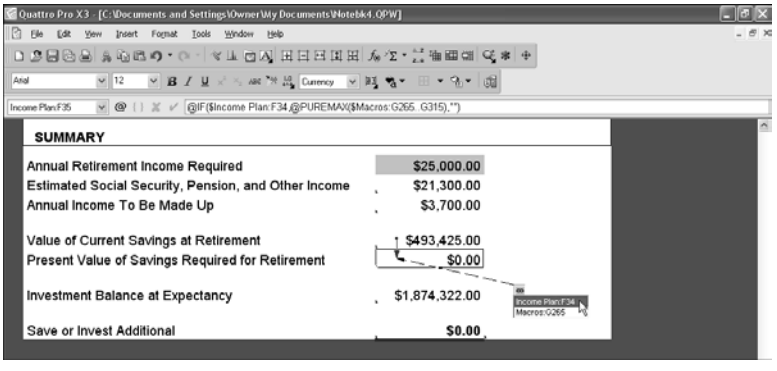

Figure 29.7
Click the Link icon to see what cells from other notebooks or sheets are linked to the current cell.

Finally, you can clear the auditing arrows by choosing Tools, Auditing, Remove All Arrows.

STUDYING FORMULAS

Some of the formulas in this notebook are quite complex. You can gain valuable insight by examining formulas to see what they do, and the syntax used to make them work correctly.

For example, the `@IF` function is one of the most commonly used and useful functions. Note the formula in cell F31:

```
@IF($Income Plan:C19, $Income Plan:C19*12,"")
```

@IF functions have three arguments: If the first part is true, then use the second part, else (otherwise) use the third part. Here, if cell C19 on the Income Plan sheet (only) has a value, then multiply that value by 12 to get an annual income, else (otherwise) place nothing in the current cell.

Simple, eh? Now take a look at cell F39 (Save or Invest Additional):

```
@IF(@AND($Income Plan:F32<>0,$Income Plan:C25<>0),@IF($Macros:A265<1,@NA,1/@FVAL
➥($Income Plan:H9/$Income Plan:C25,$Macros:A265*$Income Plan:C25,-1)
➥*$Income Plan:F35),"")
```

The three parts of the @IF function are all there, but with other nested @IF functions, along with @NA (not available) and @FVAL (future value) functions. The formula also looks up values on a table on the Macros page.

Note also, in the example @IF formula above, that Sheet names are used in place of A:, B:, and so on.

You can also use names in place of worksheet cell references in formulas. For example, you could name a column of cells Quantity, and another column Price. In yet another column you create a formula: @quantity*price and Quattro Pro multiplies the two cells to give you a result. For example, you create column headings, then select those headings, choose Insert, Name, Name Cells. From the Cell Names dialog box, you click labels, specify that cells should be labeled down from the headings, and click OK. Quattro Pro shows you the label names (see Figure 29.8), which you now can use in formulas.

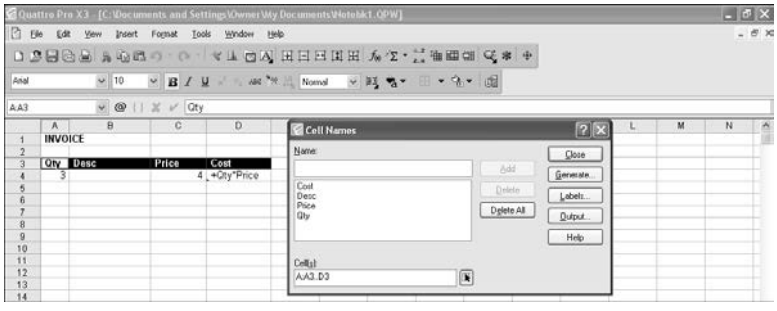

Figure 29.8
Naming cells can make it easier to create understandable formulas.

EXAMINING MACROS

You can also look at the macros page, which shows a variety of ways in which you can use macros. In the Retirement Income Plan notebook, you can click the Macros sheet (which is actually a renamed Sheet C) (see Figure 29.9).

If you're used to working with spreadsheet macros, much of this will make sense to you. If you're new to all of this, what you see will be like reading a foreign language.

Scroll down through the macro sheet and notice there are macros for starting and exiting, for printing and help. The page sets certain *variables* (values associated with names for easier use in formulas and calculations), and also provides a table of data for use in intermediate calculations.

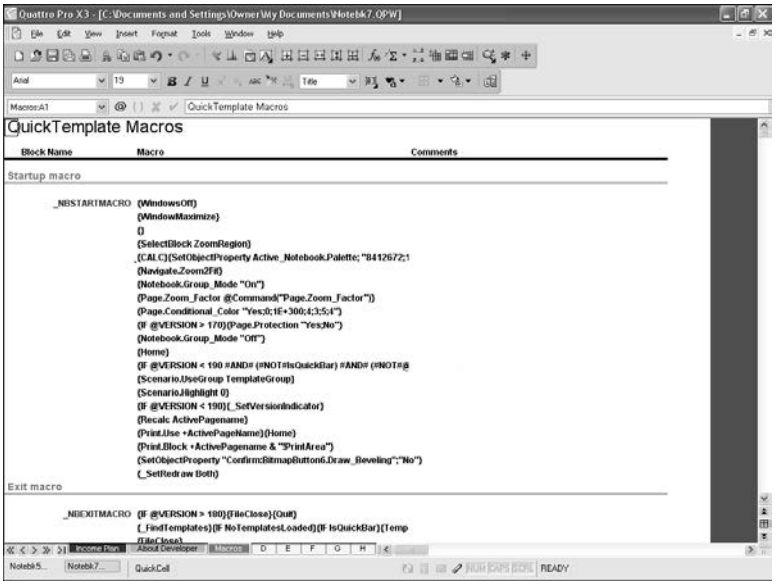

Figure 29.9
Studying macros created by others is one of the best ways to learn about macro syntax and procedures.

CREATING CORRECTLY FUNCTIONING NOTEBOOKS

So just how do you know the template is correct? Most of us just have to trust that whoever created the notebook knows what they're doing. If you're the person designing the notebook, you need to consider the following:

- What are the objectives or purposes of the notebook?
- Do expected results make sense? For example, if you save $500 per month for 10 years, do you have a projected savings of $230 million, or is it closer to the more likely $60,000 plus interest?
- Do you use absolute and relative cell references where appropriate? If you don't, you'll either get errors, or seriously flawed results.
- Are formulas being calculated using correct precedence? For example, is there a difference between 5-1*3 and (5-1)*3? (Yes, multiplications take place first, so the answers are 2 and 12, respectively.) If you don't consider calculation order, you may get unexpected results.
- Are cells being calculated in the proper order? By default, Quattro Pro uses a "natural" recalculation order: Formulas with no dependencies are calculated before formulas that depend on them. You can also force Quattro Pro to calculate formulas by column or by row.
- Do macros do what they're supposed to do? As noted in the section on macros, you need to test and retest macros to verify that they work as you intend them to.
- Finally, make sure you design the notebook in such a way that users can use it correctly. Provide labels or comments to explain just what should go where. Lock cells that you don't want them to change. Highlight cells that contain results.

FINDING AND USING OTHER ADVANCED PROJECTS

The experts and projects that ship with Quattro Pro X3 are useful, but may not be exactly what you need. So where can you find more?

The first place to look is at the Corel Web site, including these locations:

- **http://www.officecommunity.com/AppLogic+ FTContentServer100.html**—This is a collection of financial templates ranging from Added Mortgage Payment to Trade Show Budget, and including Consumer Debt Manager (if you don't ever seem to have enough money) or Handicap Index Calculator (if you seem to have more money than you need!). Although Corel does not update this page, they continue to make it available.
- **http://www.corel.com**—Corel has replaced its Office Community with additional resources at its home site. Choose the Products tab and then click WordPerfect Office Family on the left side, and click Office Ready Templates. These template packages cost from $20 to $50, but you can also download free samplers. If you explore the site a bit, you can also find a complete list of templates for each package to make sure it contains what you need.
- **Search the Web**—Use your favorite search engine to look for Quattro Pro Templates. You might just find something you need, such as a Wool Pool template for sheep farmers!

CAUTION

> Templates created by end users may not have undergone the strict auditing and proofing efforts required for "bullet proof" calculations. Further, such templates may include macros that could create havoc with your computer system.
>
> Thus, you should use templates you find on the Web with caution. Although dangerous macros are much less likely with Quattro Pro templates than with Excel templates, try to verify the source before using them.

WORKING WITH QUATTRO PRO MACROS

A macro is simply a sequenced collection of actions. When you play a macro, Quattro Pro executes each action one after another. Macros can be relatively simple (for example, entering a sequence of text), or quite complex (for example, requesting information, calculating results, and generating reports).

You need not be a gear head to understand and use macros, or even to create simple macros. But if you're up to the challenge, you can become quite proficient in automating spreadsheet tasks that otherwise might be tedious and prone to error.

UNDERSTANDING QUATTRO PRO VERSUS OTHER TYPES OF MACROS

Quattro Pro can use three types of macros. The type of macro you use depends on its suitability for your needs. These include

- **Quattro Pro**—These macros are stored in notebook cells. Use this type of macro when a task is performed within Quattro Pro.
- **PerfectScript**—These macros are stored in a .wcm file, and are created within WordPerfect. This type of macro is useful when you want to automate tasks with several notebooks or interact with other WordPerfect Office applications, such as WordPerfect. For example, you can update Quattro Pro data in a WordPerfect report.
- **Visual Basic for Applications (VBA)**—This external program enables you to develop scripts that are saved within specific projects using a robust version of the Visual Basic programming language. You can access the VBA Editor from within Quattro Pro.

➔ For information on creating and working with PerfectScript Macros, **see** "Using Macros to Automate Repetitive Tasks," **p. 568**.

➔ For information on working with Visual Basic for Applications, you might consider *Absolute Beginner's Guide to VBA* by Paul McFedries (Que Publishing, 2004).

RECORDING MACROS

To understand and to use Quattro Pro recorded macros, let's create a macro in a macro library that types a worksheet heading and date. Although there are various ways we could approach this task, consider Figure 29.10, which shows two sheets side by side. Sheet A (EW Business Proj) shows the result of playing the macro, and Sheet B (Macros) shows the macro itself.

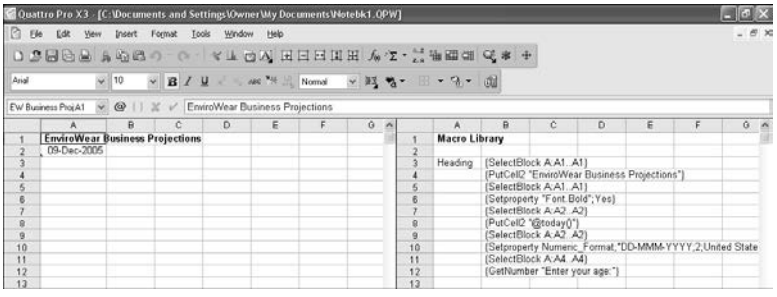

Figure 29.10
It's easy to record macros to accomplish repetitive tasks.

To record a macro as shown in these figures, follow these steps:

1. Begin by opening a new notebook.
2. Determine where you want to place your recorded macros. Although you can place them anywhere, consider placing them on a second sheet of the notebook that you use strictly for macros.
3. Click a cell where you want your first macro, and type a short name for the macro (for example, **`Heading`**).
4. Click the cell immediately to the right of the label. This is where the recorded macro will be stored.

5. Choose Insert, Name, Name Cells, and then click the Add button. Quattro Pro automatically selects the label to the left as the name of the named cell. From this point forward, Quattro Pro also knows to come to this location to begin executing a macro.
6. Choose Tools, Macro, Record. Quattro Pro displays the Record Macro dialog box (see Figure 29.11).

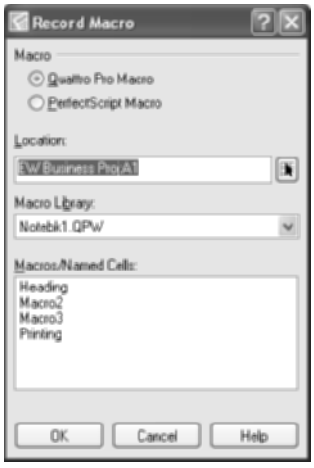

Figure 29.11
Use the Record Macro dialog box to name macros and specify where to place the macro after you record it.

7. Select the name of the Named Cell (for example, Heading).
8. Click OK to begin recording the macro.
9. Click Cell A1, in Sheet A.
10. Type the heading for the notebook worksheet (for example, **`EnviroWear Business Projections`**) and press Enter.
11. Select Cell A1 again and press Ctrl+B to make the text bold.
12. Select Cell A2.
13. Type **`@today()`** and press Enter.
14. Select Cell A2, and choose Format, Selection Properties, or click the Set Attributes button on the property bar.
15. Click the Numeric Format tab and choose a format type for dates that you prefer, and click OK.
16. Select the cell where you want to start the data, for example, Cell A4.
17. Choose Tools, Macro, and select Record to stop the recording.

Quattro Pro places the sequence of action in a column of cells, starting at the macro's named location (for example, Heading).

To play the Heading macro, and to verify that it works properly, follow these steps:

1. Since the current Sheet A already has a heading, insert a new Sheet A by right clicking the Sheet A tab and choosing Insert Sheet.
2. Choose Tools, Macro, Play, or press Alt+F2. Quattro Pro displays the Play Macro dialog box (see Figure 29.12).

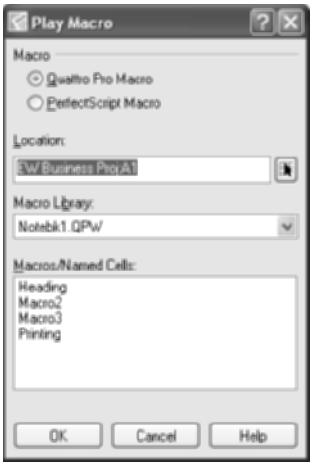

Figure 29.12
Use the Play Macro dialog box to select a recorded macro to play.

3. Select the name of the macro, for example, Heading, and click OK.
4. Verify that the macro placed a heading and date on the blank Sheet A.

If you get an unexpected display at the bottom of the screen when you try to play a macro, see "Why Doesn't My Macro Just Play?" in the Troubleshooting section at the end of this chapter.

This simple example doesn't seem terribly practical only because if the sheet's heading is already there, there's no need for a macro to create it. A more likely use for such macros could be for formatting sections of the worksheet, selecting a named block of cells and printing it, and so on. (Refer to Figure 29.9, which shows a series of complex macros used in an advanced Quattro Pro project.)

CREATING AND USING MACRO LIBRARIES

Macros such as the Heading macro *can* be useful, however. You can use macros created in another notebook by creating Macro Libraries. For example, if you want to use the Heading macro for any new notebook you create, follow these steps:

1. Create a notebook that you designate as a Macro Library (that is, it contains several macros that you plan to reuse).
2. Create the macros you wish to store in the library, making sure that they work generically on any new notebook. For example, don't refer to named sheets or cells if those don't exist in the target notebook.

3. Choose Format, Notebook Properties.
4. In the Active Notebook dialog box, click the Macro Library tab, and choose Yes.
5. Click OK to return to the notebook.
6. Save the notebook.

Now, any time the notebook is open, Quattro Pro knows to look to the Macro Library for available macros.

To use a Macro Library, follow these steps:

1. Make sure the file containing the Macro Library is open.
2. In the new notebook, choose Tools, Macro, Play, or press Alt+F2.
3. In the Play Macro dialog box, click the Macro Library drop-down menu and select the name of the file that contains the Macro Library.
4. From the list of macros, select the one you want to play and click OK.

NOTE

> You can also create a System Notebook that contains your library of macros. You can even hide such a notebook, which means it stays open until you exit Quattro Pro. Quattro Pro's help system explains the details for creating and hiding System Notebooks.

WRITING QUATTRO PRO MACROS

Although you can record many macros, you can also write and edit macros by hand.

For example, in the Heading Macro, you could adjust the target sheet or cells, and add other steps after you record the basic macro. Or you could use an `@IF` statement to determine if Cell A1 already contains data, and terminate the macro if it does.

As you become more familiar with the myriad Quattro Pro macro commands, you can write your own macros from the start, bypassing the recording process altogether. This is not only useful, but necessary if you plan to create complex macros, since many macro procedures cannot be recorded.

For example, if you want to insert a prompt for the user to provide a numeric value, you could add the following command:

```
{GetNumber "Enter your age:",A:A4}
```

The preceding command displays the prompt (see Figure 29.13), and after the user types the number and clicks OK, Quattro Pro inserts the number at the designated location (for example, Sheet A, Cell A4).

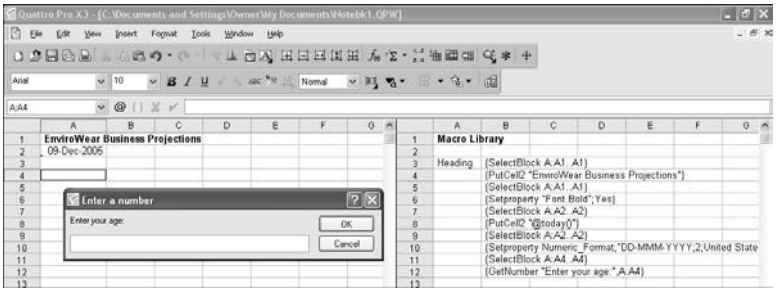

Figure 29.13
You can type macro commands that accomplish tasks you can't record, such as asking for user input.

NOTE

> An exhaustive examination of macro commands is not possible in this book. However, Quattro Pro's help screens do provide detailed explanations, including proper syntax, for all of Quattro Pro's macro commands. Simply choose, Help, Macro Commands, Quattro Pro Macros Help. Choose commands from either list to learn more about them.

CREATING PUSH BUTTON MACROS

Although playing macros is relatively simple, you have to know they exist before you can use them. Thus, if you prepare a notebook for use by others, they may not realize you have created macros to select an area for printing; to print one, two, or three copies; or to format cells in a special way.

Quattro Pro's form controls can help. In a word, you create a push button that contains a macro, and when the user clicks the button, the macro does its job.

Let's suppose that you want to quickly format selected cells for currency, to two decimal places. Follow these steps:

1. Choose Insert, Form Control, Push Button.
2. Drag the mouse pointer to create a box the size of the push button you want to place on the notebook.
3. Release the mouse button and Quattro Pro creates a push button as a screen object.
4. Select the button (by default, it remains selected after you create it), and choose Format, Selection Properties, or press F12, or click the Set Attributes button on the toolbar. Quattro Pro displays the Button dialog box (see Figure 29.14) .
5. Click the Label Text tab and type the text you want to appear on the button (for example, `"$Format"`).
6. Click the Macro tab, and in the Macro text box, type the macro (for example, `{Setproperty Numeric_Format; "Currency;2;United States;0"}`).
7. Click OK to return to the notebook.

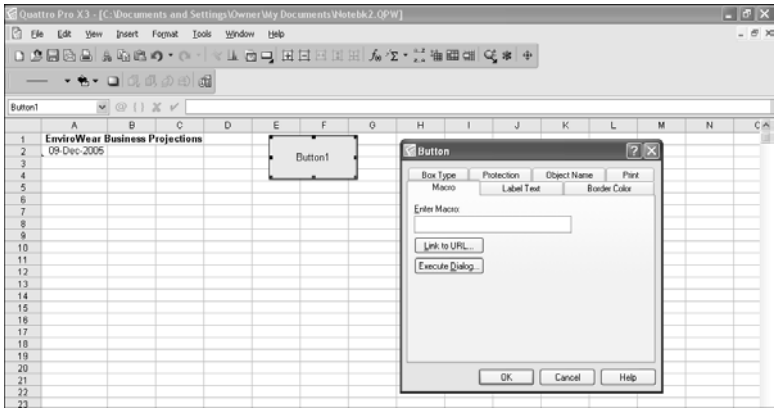

Figure 29.14
The Button dialog box helps you establish functions and settings for a Push Button form control.

Now if you click the $Format button, Quattro Pro formats the currently selected cell or cells to display the currency format.

Unfortunately, you cannot associate a push button with an existing Quattro Pro macro. You must enter the entire macro in the Macro text box. Thus, if you want a more complex macro, for example, one that takes up more than one line when you record it, you have to be careful to enter it as a single line, with no spaces or commas between the commands. For example, to format for currency *and* bold the selected cell, you type

```
{Setproperty Numeric_Format;"Currency;2;United States;0"}{Setproperty
"Font.Bold";Yes}
```

TIP FROM

Read Gilgen

If you're not yet familiar with Quattro Pro macro syntax, you can record the macro as described earlier in this chapter, and then use the results for the button macro.

TIP FROM

Read Gilgen

An easy way to use multiline macros is to copy all of the lines, paste them into WordPerfect as unformatted text, remove the hard returns, and then copy the result into the macro text box of the Quattro Pro button dialog box.

NOTE

Quattro Pro also provides a Dialog Designer that enables you to create more complex dialog boxes to solicit data, and then to place it in the notebook. Such boxes can be associated with the Forms Control button using the `{DoDialog}` command. See Quattro Pro's help for the Dialog Designer (Tools, Macro, Dialog Designer) for details on how to create dialog boxes.

INTERACTING WITH THE WEB

All three WordPerfect Office X3 products enable you to publish your documents to the Web. However, Quattro Pro can also retrieve data from the Web and enter it into a notebook.

PUBLISHING SPREADSHEETS ON THE WEB

You publish notebook data to the Web for much the same reasons that you publish WordPerfect or Presentations documents: to make the information available to a targeted audience, either on the World Wide Web, or perhaps limited to company employees on a corporate intranet.

You could, of course, e-mail the Quattro Pro file itself, but by publishing it to a Web site, you unclog the e-mail channels, and also make it less likely that the data will get changed.

Quattro Pro notebooks also flow differently from sequential WordPerfect documents, or slide-based Presentations documents. For example, you often create worksheets that extend many columns wide and several rows long. When you print such pages you have to consider where page breaks occur. When you publish a worksheet to the Web, you can publish the entire sheet, which then can be viewed as a whole with a browser, although the viewer will have to scroll side to side as well as up and down.

However, you don't *have* to publish a whole notebook. You can select one or more parts of the worksheet, and arrange them however you'd like, along with graphs you want to include.

PUBLISHING TO HTML

When you publish a notebook to the Web, Quattro Pro automatically creates the necessary HTML code to display your data, typically in table format.

Consider the data shown on the Web page in Figure 29.15. To publish Quattro Pro data to this type of Web page, follow these steps:

1. Try to determine just what you want to present, and in what order. You might want to publish the whole notebook, but publishing only parts might be more effective.
2. Choose File, Publish To, Publish to Internet. Quattro Pro displays the Publish to Internet dialog box (see Figure 29.16).
3. Quattro Pro assumes certain defaults, which include
    - The publication range includes the entire *current* sheet. Other sheets are not included.
    - Data is published in table format. Rarely, if ever, will you publish data in text format since data runs together, making it nearly impossible to read.
    - The name of the HTML file is the same as the Quattro Pro file, with the .htm extension instead of .qpw.
    - Today's date is the default last revision date.
    - The name of the logged-in Windows account appears in the By box.

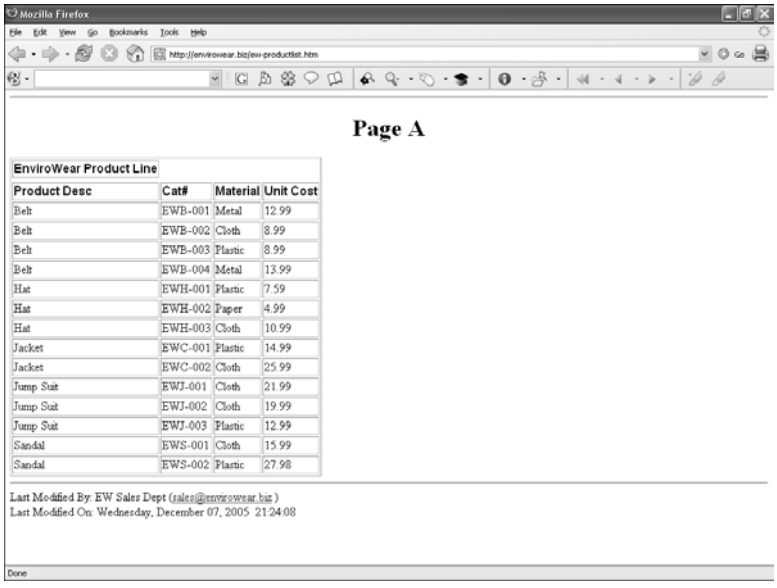

Figure 29.15
Quattro Pro data can be published to the Web in table format.

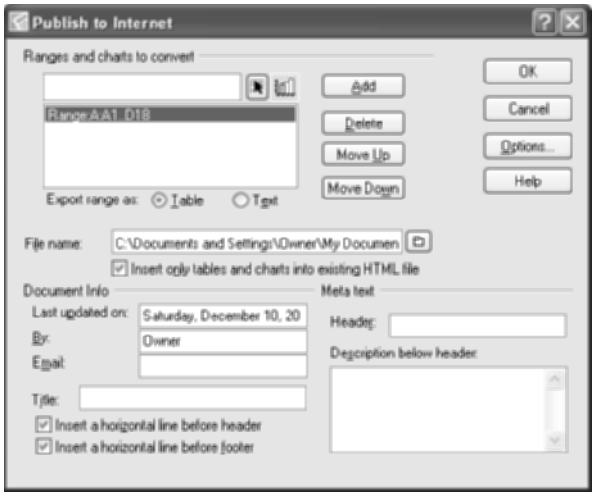

Figure 29.16
The Publish to Internet dialog box enables you to specify how your notebook should appear on the Web.

4. Click OK and Quattro Pro generates HTML code for your notebook.

To view the file, open your browser and choose File, Open (or Open File) and browse for the page you just created (refer to Figure 29.15).

We skipped over several options, some of which are important. For example, to specify just what to include in the published notebook, follow these steps:

1. Choose File, Publish To, Publish to Internet. Quattro Pro displays the Publish to Internet dialog box (refer to Figure 29.16).

2. Assuming you don't want to publish the entire notebook, highlight the range that is shown, and click Delete.
3. Click the Range picker, and when the dialog box minimizes, go to the worksheet and select the range you want to include by dragging from one corner to another. Double-click the Publish to Internet title bar to return to the dialog box.
4. Click Add to add the selected range to the list of publishable ranges.
5. Repeat steps 3 and 4 until you have all the sections you want to publish, including ranges from other sheets in the notebook.
6. If the notebook includes charts that you want to include, click the Chart button, select the appropriate chart from the list, and click OK.
7. Click Add to add the selected chart.
8. You can reorder the selections by selecting an item and clicking Move Up or Move Down.

Other options include the following:

- **Document Information**—Here you can include your name or contact person, e-mail, and edit the last modified date.
- **Meta Text**—You don't see this information on the Web site, but it is visible to Internet search engines. If you want the world to find you, include a few key words that people are likely to search for.
- **Options**—Clicking this button displays the Publish to HTML Options dialog. Here you can specify what graphics format to use for charts, what kind of layout you want (for example, a frame-enhanced layout), and modify color settings.

Quattro Pro's default layout is a single page. For an easier-to-navigate Web site, especially if you use different sheets of your notebook, choose the frame-enhanced page (see Figure 29.17).

PUBLISHING TO PDF

Although Web pages are a natural way to adapt Quattro Pro data for the Web, publishing to PDF offers a more faithful representation of your notebooks, including data layout, pagination, fonts and formatting, and charts.

You prepare a PDF document the same way you do a printed document, including placement of page breaks so that important data stays together.

To publish a notebook to PDF, follow these steps:

1. Choose View, Page Breaks to view how your data is paginated.
2. Drag the blue page-break lines to create breaks at more natural locations.
3. Choose File, Print Preview to see how the pages will appear; then choose Close.
4. Choose File, Publish To, Publish to PDF. Quattro Pro displays the Publish to PDF dialog box (see Figure 29.18).

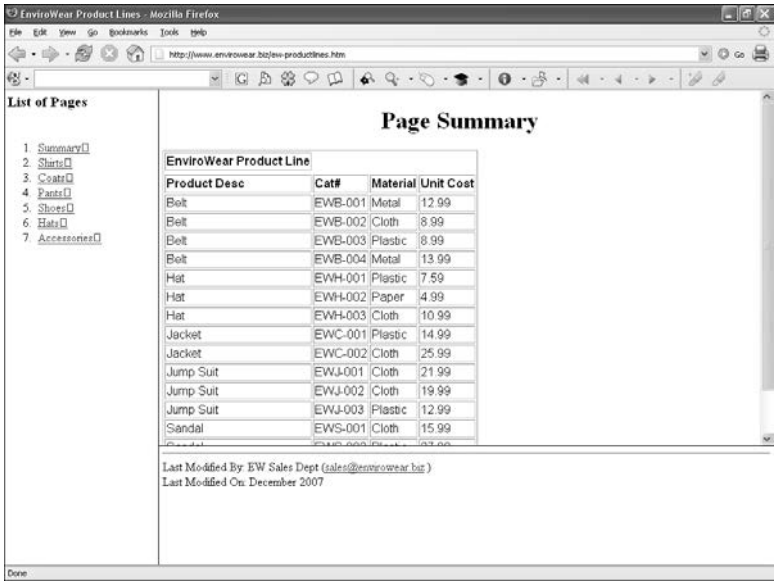

Figure 29.17
A frame-based layout can make it easier to navigate a published notebook that contains several sheets.

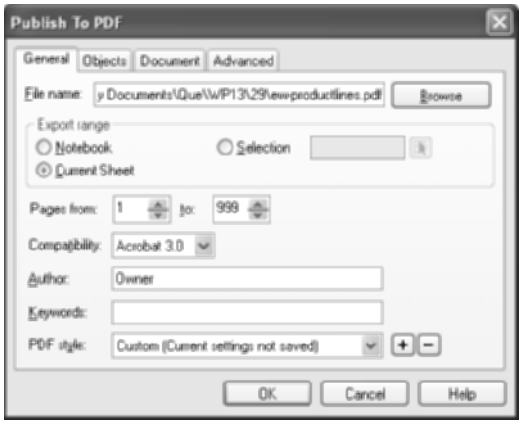

Figure 29.18
Quattro Pro enables you to quickly and easily publish a notebook to the PDF format.

5. Choose the range: the entire notebook (all sheets), the current sheet, or a range you choose using the Range picker.

TIP FROM

Read Gilgen

When publishing to PDF, you can only choose one range. If you have several sections of a spreadsheet you want to include, just copy and paste the relevant sections to a blank sheet, and then publish just that sheet to PDF.

6. Modify options, such as Author or Keywords. However, most other options are best left at their default settings unless you know you need to change something.
7. Click OK to publish the document to PDF.

You can use Windows Explorer to browse to the file and open it with Adobe Acrobat.

➔ For information on transferring your published HTML or PDF files to a Web server, **see** "Transferring Files to a Web Server," **p. 900**.

RETRIEVING DATA FROM THE WEB

One of Quattro Pro's really nifty features is its capability to retrieve data from an existing Web site, and place the data in a worksheet. How well it does this depends, in part, on the type of data being retrieved. Some Web sites, such as stock quote sites, are specifically designed to let you retrieve information.

Consider, for example, the Web page shown in Figure 29.19, which is an EnviroWear Web page created from a Quattro Pro notebook. (Currently, this page can be found at `http://envirowear.biz/ew-productlist.htm`.)

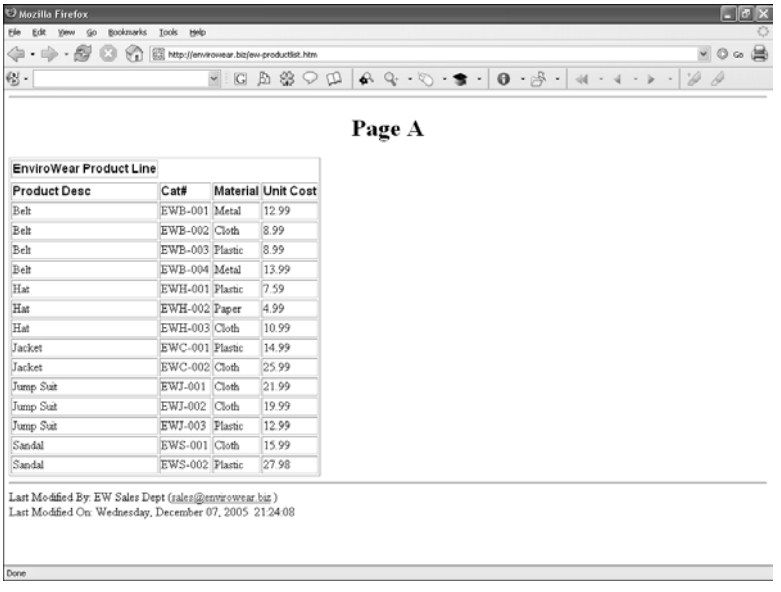

Figure 29.19
Quattro Pro can retrieve data directly from a Web page.

If you want to capture the data in this Web page and place it in a Quattro Pro notebook, follow these steps:

1. Find the Web page from which you want to retrieve information. Typically, it should be a table, but Quattro Pro will import almost anything.
2. In Quattro Pro, choose Tools, Internet, Create Web Query. Quattro Pro displays the Create Web Query dialog box (see Figure 29.20).

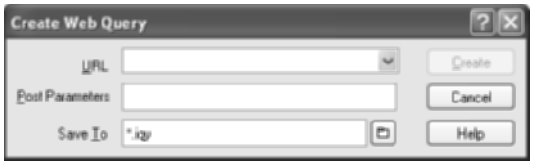

Figure 29.20
Use the Create Web Query dialog box first to specify the location of the data you want to retrieve.

3. Type the URL where the data is located, and provide a name for the query file (for example, **`ew.iqy`**).
4. Click Create to save the inquiry file.

To run the query, follow these steps:

1. Choose Tools, Internet, Run Web Query.
2. From the list of .iqy files, select the inquiry you want to run (for example, `ew.iqy`).
3. Click Open, and Quattro Pro displays the Run Web Query dialog box (see Figure 29.21).

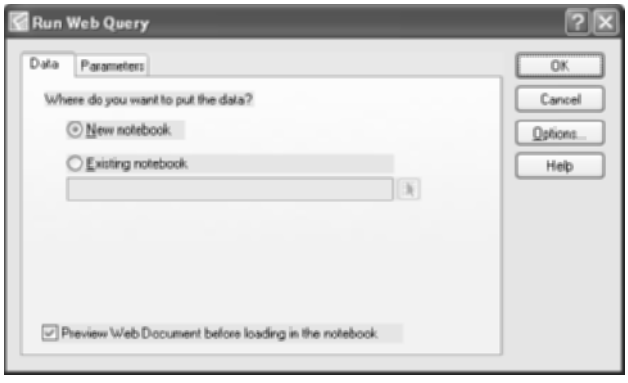

Figure 29.21
Select a previously defined Web query from the Run Web Query dialog box.

4. Choose from among these options:
   - You can retrieve the information into a new notebook (at Cell A1), or into the current notebook at the location you specify.
   - You can preview how the information looks in Quattro Pro before you actually retrieve it. When you do, you can select the actual range of data you import.
   - If the Web site requires certain parameters in order to display the information you want, you can enter those on the Parameters tab.
   - If you click Options, you can choose to link the data, to size columns to fit the data, to retain HTLM formatting, import tables only, and so on.
5. Click OK to have Quattro Pro contact the Web page and retrieve the information.

NOTE

> It may seem obvious, but you must have an active Internet connection or the Web Query feature cannot work.

Quattro Pro's retrieval process is good, but not perfect. After you retrieve the information, you'll probably need to fiddle a bit with the results (see Figure 29.22), such as widening columns, adjusting row heights, and so on. For example, some cells appear to have repeating information. Quattro Pro may have placed a "\" at the beginning of the cell, which is its way of saying to display repeatedly the contents of the cell.

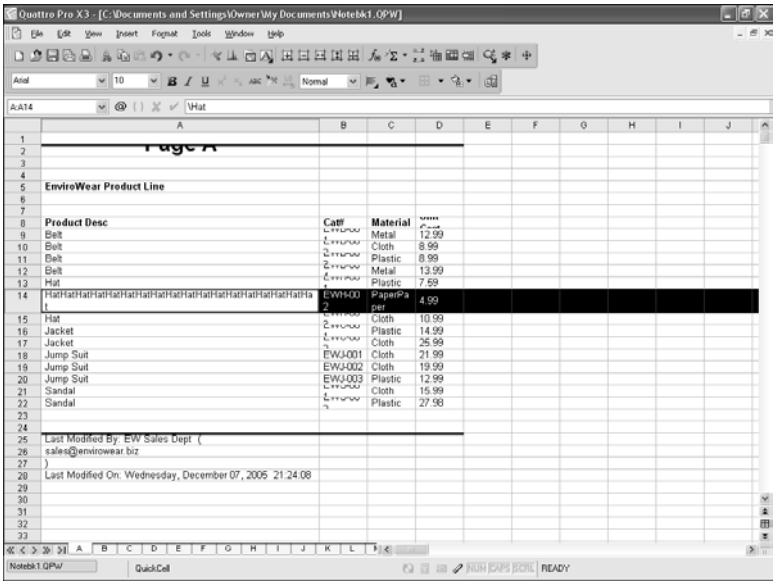

Figure 29.22
Retrieving data is easy, but you may have to work a bit at formatting what you retrieve.

TROUBLESHOOTING

HOW COME MY WORKSHEET WON'T OPEN?

I saved a worksheet with only medium-level security, but when I try to open it, nothing happens.

You're right. Medium-level password protection requires that you use a command line to start Quattro Pro, using the following syntax:

```
qpw.exe /spassword "[drive:]\[full_path_name]\ [filename.qpw]"
```

(There's no space between */s* and *password*, and there are quotes around the path and filename.)

If you protect a file used as a Macro Library in this way, you can open the file, and although you can't see the file, other Quattro Pro files can access the macros contained in the file.

WHY DOESN'T MY MACRO JUST PLAY?

When I try to play a macro, a strange-looking screen appears at the bottom and the macro seems to hang or stop working.

What you're seeing is the Macro Debugger screen. You may have accidentally turned it on while creating or playing macros. The debugger is handy if you're trying to figure out just what isn't working in a macro sequence.

To turn off the debugger, choose Tools, Macro, Debugger.

WHY DOESN'T MY MACRO WORK?

I know my cell references are correct, but my macro doesn't work when I try to place something on the first sheet of the notebook.

Although there can be many reasons why a macro won't work, it sounds like you recorded a macro, and then changed the name of the sheet, thus making it impossible for the macro to find the sheet it's looking for. Check the macro and the name of your sheet to make sure they match.

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PART IX

CREATING PRESENTATIONS

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CHAPTER 30

Getting Comfortable with Presentations

In this chapter

by Read Gilgen

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Presenting…Presentations!

One of the best-kept secrets about the WordPerfect Office Suite is Presentations. What started as a drawing program (Draw) many versions ago has now evolved into a sophisticated and highly useful drawing and presentation program.

You may wonder how it compares to PowerPoint. Essentially, PowerPoint began as a presentation program and added some drawing tools, whereas Presentations began as a powerful drawing program and evolved into a presentation program as well. Thus you'll find that Presentations's drawing features outpace PowerPoint's, whereas PowerPoint holds a slight edge in presentation power and flexibility.

In this section of the book we will focus primarily on Presentations's presentation capabilities. Most of the drawing features have already been covered in the WordPerfect section, in chapters dealing with graphic images.

➔ For more information on using Presentations's drawing features, **see** "Adding Drawings by Using Presentations," **p. 800**.

I've used Presentations for years, and I think you'll like it. At the very least you'll have people wondering where you came up with those nifty-looking, non-PowerPoint templates!

Presentations…Just a Tool!

Although presentation programs are all the rage these days, you know well how bad some presentations can be. Corel's Presentations program is only a tool that, when used well, can increase the effectiveness of a good message conveyed by a good presenter. Used poorly, it detracts from what you have to say and creates a negative impression for your audience.

Throughout these chapters, you'll learn not only the mechanics of Presentations, but also some suggestions about why or why not, and when or when not, to use various features and procedures.

Making a good presentation requires lots of work. You have to develop content that is useful and engaging. Then you design the presentation, taking into account the audience members' backgrounds and needs. Finally, you have to rehearse your presentation until the tool (Presentations) becomes transparent to your audience.

In other words, with patience and hard work, you too can be a good presenter. And with Corel Presentations, you can increase your effectiveness and add just the right professional touch to your presentations.

Starting Presentations

When you start Presentations, you are first asked whether you want to work in Presentations or PowerPoint mode. PowerPoint mode isn't nearly as much like PowerPoint as Corel would lead you to believe, but you're certainly welcome to try it. In these chapters, we're assuming you've chosen the Presentations mode. You can switch modes at any time by choosing Tools, Workspace Manager.

The next screen you see is the PerfectExpert dialog box (see Figure 30.1). At the top of the list of projects on the Create New tab are the latest projects you have worked on. In particular, note these two major options:

Figure 30.1
The PerfectExpert dialog box enables you to create new drawings or new slideshows, based on predefined projects or of your own creation.

- **Presentations Drawing**—This option takes you to the Presentations drawing screen (see Figure 30.2) where you have myriad options for creating custom drawings. This is essentially the full-sized version of the draw program found in WordPerfect. You can print these drawings as posters, including oversized, multipage posters, or save them in a variety of formats that can be used in any other program or even on the Web.

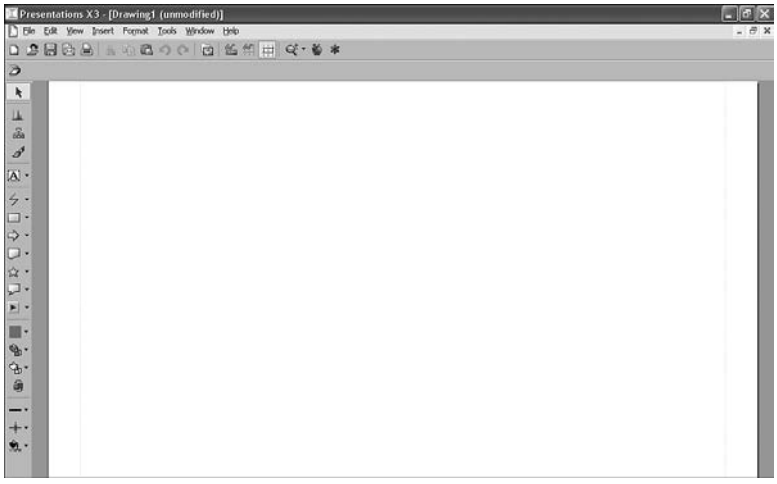

Figure 30.2
The Drawing screen is a powerful graphics creation and editing program, and is the full version of WordPerfect's Draw program.

➔ For more information on using the Drawing program features, **see** "Adding Drawings by Using Presentations," **p. 800**.

- **Presentations Slide Show**—Choosing this option takes you to the slideshow program where you can choose background templates, create slides, add transitions, insert multimedia elements, rearrange slides, and play the slideshow. You can still use all of Presentations's drawing tools, but you do so in the context of a slide presentation.

If you want to continue working on a project you have started, click the Work On tab (see Figure 30.3) where you find a list of recent projects, including WordPerfect and Quattro Pro projects, in addition to drawings or slideshows created in Presentations. Simply select a

project, or browse for a project that's not on the list, and the PerfectExpert takes you to the appropriate application screen.

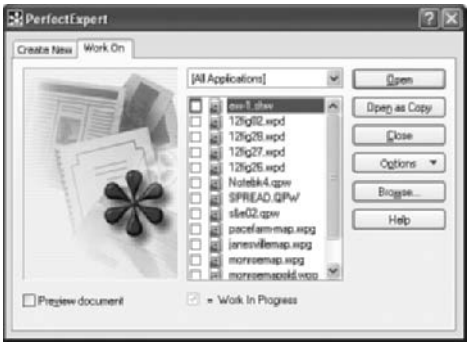

Figure 30.3
The PerfectExpert's Work On tab helps you quickly find and open recent WordPerfect Office projects.

For our purposes, let's click the Create New tab, select Presentations Slide Show, and click Create. Presentations next presents you with the Startup Master Gallery (see Figure 30.4). Browse the designs by choosing from the category drop-down list, and scrolling through the designs. When you find the slide look that you want, select it, and click OK.

Figure 30.4
Presentations offers several attractive and colorful slide background designs.

NOTE

Both the PerfectExpert and the Startup Master Gallery offer you the option of skipping those two screens and going directly into Presentations. I suggest you not do this yet, but wait until you become more comfortable with Presentations and decide just how you want Presentations to start up.

TOURING THE PRESENTATIONS SCREEN

You're now finally at the Corel Presentations screen (see Figure 30.5), ready to create your first slide on your way to your first slideshow, or collection of slides.

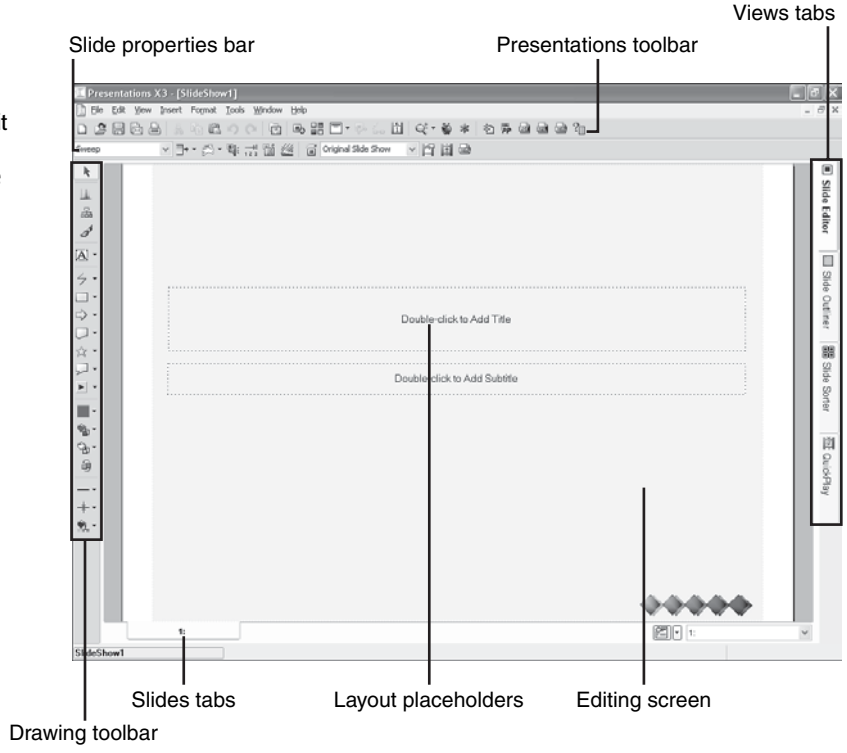

Figure 30.5
You create and edit slides in the Presentations slide editor screen.

TIP FROM

Read Gilgen

Corel provides a tutor to introduce you to a variety of Presentations features and procedures. These include an introduction to the Presentations workspace, and how to create flyers, charts, and slide masters. Although not comprehensive, it can help suggest uses for Presentations that might not be obvious. Just click the Corel Tutor on the toolbar.

Familiar regions of the Presentations screen include the menu and the toolbar, although half of the toolbar includes icons that you may not have seen before.

Beneath the toolbar is the properties bar that provides easy access to more ways to modify your slides and your slideshow.

On the left is the drawing toolbar, which is the same toolbar found in the Draw program in WordPerfect.

On the right are the different options for viewing your slides.

On the bottom you see a tab (or tabs if you already created some slides). Click a tab to jump to a specific slide.

In the center of the screen is the editing area, where you add text, images, or multimedia elements that form the basis of your presentation. A slide typically has several placeholders, or boxes into which you insert text, or other graphic or data information. For example, the title slide has a placeholder for a title and a subtitle.

Creating Your First Slide

Normally, I'd preach the importance of organizing your material, typically using an outline, before creating your slides. But this time, we'll just jump right in and create a slide or two, just so you'll get a feel for how it's done in Presentations.

The opening slide is a title slide, with text boxes for a title and a subtitle. To add text to the placeholders on a slide, follow these steps:

1. As instructed on the screen, double-click the title box to open it, and then add the text for your title, for example, My First Slide Show.
2. Double-click the subtitle box and type your name.
3. Single-click anywhere outside of the placeholder box to exit the text-editing box.

Voilá…your first slide!

Understanding Slides

This might be a good time to talk about how slides are organized and how they work. Unlike a word processing document that sequentially flows from one page to the next, each slide is its own self-contained document. Slides consist of these three basic elements:

- **Background Layer**—The background layer includes a design, and also a preselected combination of font sizes and styles, text and other colors, and other elements, such as a corporate logo, that appear on every slide. You cannot change elements of the background layer while editing slides.

CAUTION

> Although you can vary the background if necessary, the background layer is designed to give a consistent look to your slideshow. Changing backgrounds draws the audience's attention to the slide rather than to the content, and should be avoided if at all possible.

- **Layout Layer**—The placeholders you see, including their location and size are part of the layout layer. This layer assists you in organizing your material in a consistent manner. You can choose from a variety of predefined layouts. However, you don't necessarily have to use all of the layout elements, and you can also add other objects to your slides.
- **Slide Layer**—The screen where you add content is called the slide layer. The text you put in the layout placeholders can be augmented by additional text boxes, graphic images, and even multimedia elements such as sound or video.

If you have extra placeholders on your screen and want to get rid of them, see "How Do I Get Rid of the Placeholder?" in the Troubleshooting section at the end of this chapter.

ADDING A SLIDE

Your one-slide slideshow is snazzy, I'm sure, but not very substantial. To add another slide, you have these options:

- Choose Insert, New Slide from the menu. Presentations opens the New Slide dialog box and asks you to choose a layout. Click OK to select the default bulleted list layout (see Figure 30.6).

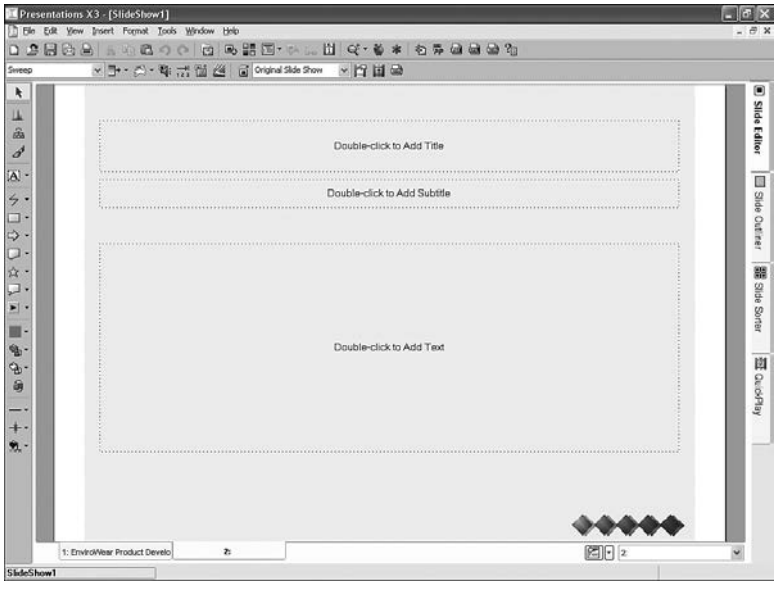

Figure 30.6
Layouts, such as the bulleted layout, provide placeholders to make it easy to add text and to maintain a consistent look.

- Click the Insert New Slide button at the lower right of the editing screen. By default, Presentations inserts a new slide with a bulleted list layout. If you click the drop-down list at the right of this button, you can choose a different layout.
- Press Ctrl+Enter, the same keystroke used to create a new page in WordPerfect. This also inserts a new slide, using a bulleted list layout.

Now you can add text to the inserted slide. Type a title for your bulleted list. Then double-click the Text area and type two or three items, pressing Enter between each one.

NOTE

> You do not have to use layout elements, such as the subtitle, if you don't need or want to. When you play the slideshow, unused elements do not display.

You now have your very first slideshow, albeit only two slides long. This is enough to allow us to explore other aspects of the Presentations interface.

SELECTING AND USING DIFFERENT VIEWS

Until now you have been working in the Slide Editor screen (refer to Figure 30.5). Let's take a peek at other ways you can view and work with your slide presentations.

SLIDE OUTLINER

Most slideshow content consists of textual information that can be organized logically into an outline format. To see what your slideshow looks like as an outline, click the Slide Outliner tab at the right side of the screen (or choose View, Slide Outliner from the menu). The Outliner view displays only your text (see Figure 30.7 with content from several slides), and thus is very useful as you develop your slideshow, allowing you to focus on content instead of how the slides are going to look.

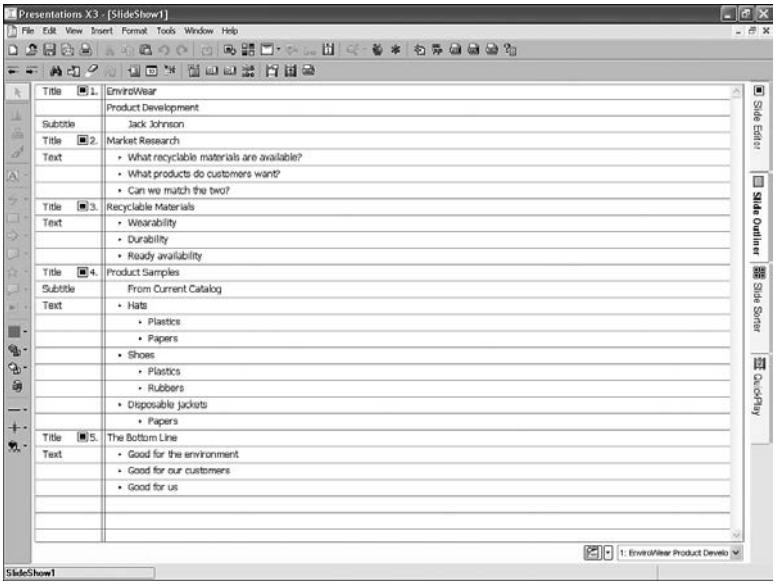

Figure 30.7
Use the Slide Outliner view to quickly create and organize slideshow content.

Note that the drawing icons at the left are grayed out, indicating you can't work on graphic elements in this view.

In the notebook's left margin, you see the types of placeholders or layout elements, and in the main notebook area you see the actual content of those elements, arranged hierarchically.

Adding, removing, or reordering elements is easy, similar to the methods you use in WordPerfect's outlining feature. In fact, you can even create your outlines in WordPerfect and import them into a Presentations slideshow.

To return to the full Slide Editor view for a specific slide, double-click the slide icon of that slide on the Slide Outliner. You can also click the Slide Editor tab at the right side of the screen.

➔ For more information on outlining in WordPerfect, **see** "Working with Outlines," **p. 290**.
➔ For more information on using the Slide Outliner, **see** "Creating Content by Outlining," **p. 772**.

SLIDE SORTER VIEW

Viewing your slideshow one slide at a time doesn't let you get an overall sense of what your presentation looks like. To view your show in the Slide Sorter, simply click the Slide Sorter tab at the right side, or choose View, Slide Sorter. Presentations displays your slides as thumbnails (miniature representations) (see Figure 30.8).

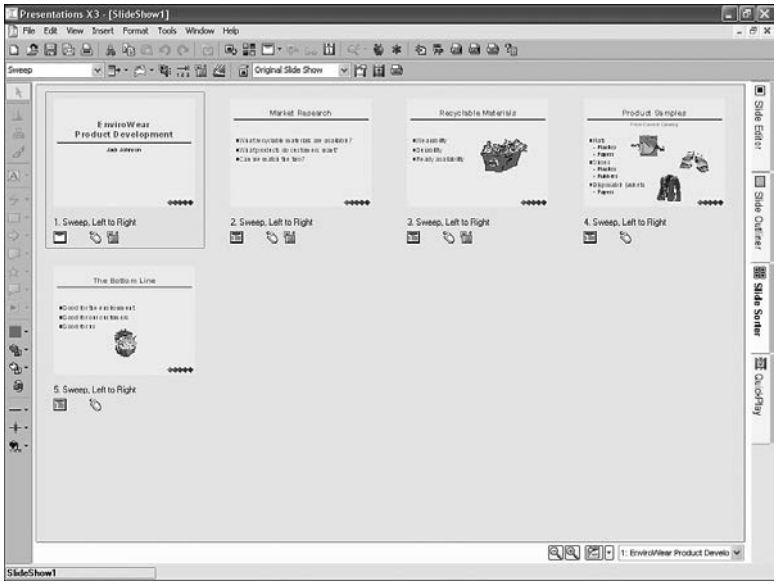

Figure 30.8
The Slide Sorter helps you organize your slideshow.

In this view you see the slide sequence, as well as indicators as to the slide's layout type, what type of transition effects and timing it has, whether it contains multimedia elements or speaker notes, and so on.

You can also easily rearrange your slides by dragging them, and then marking them to be skipped over during the slideshow, or deleting them.

To return to the full Slide Editor view for a specific slide, double-click the thumbnail version of that slide. You can also click the Slide Editor tab at the right side of the screen.

*If you are having trouble locating a slide in your slideshow, **see** "… Where Is It?" in the Troubleshooting section at the end of this chapter.*

➔ For more information on using the Slide Sorter, **see** "Using the Slide Sorter," **p. 870**.

QUICKPLAY VIEW

If you want to see what your slide will look like when played, click the QuickPlay tab at the right side. Presentations begins playing the slide at the current slide.

Note that Presentations does not display any of the placeholder information. Also, if the slide contains animations (for example, displaying one bullet at time), only the nonanimated elements display until you advance to the next element.

For now, however, let's just exit the slideshow and return to the view you were in when you selected QuickPlay. To exit a slideshow that's in progress, simply press the Esc key. There are other ways to do this, but this is the easiest by far.

➔ For more information on playing a slideshow, **see** "Playing a Slideshow," **p. 881**.

NAVIGATING YOUR SLIDESHOW

After you create several slides and begin to edit or rearrange them, you need to learn to navigate quickly from one place to another. While in Slide Editor view, navigation options include the following:

- Press PgDn or PgUp keys to move forward or backward one slide at a time.
- Click the tab that corresponds to your target slide (refer to Figure 30.5). If you have several slides, the slide titles disappear leaving only the slide number. If the slideshow is too long to display all of the slides, you can repeatedly click the last slide to move forward, or the first slide to move backward.
- Click the drop-down list of slides at the lower right; then click the title of the slide you want to go to (see Figure 30.9).

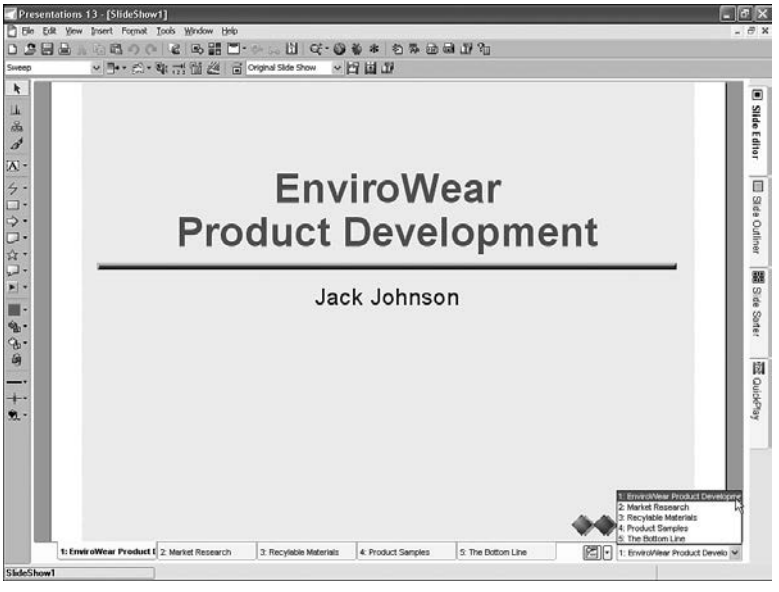

Figure 30.9
Move around your slideshow by selecting slides by their titles.

- Click the Slide Sorter view; then double-click the slide you want to go to. This option has the advantage of letting you see what the slide looks like instead of depending only on the slide's title or number.
- Click the Slide Outliner view; then double-click the icon for the slide you want to go to. Again, this view gives you more information about the target slide.

SAVING A SLIDESHOW

Normally, I'd have already preached the importance of saving your work, and doing so frequently. If you already figured it out, good for you! If not, just remember that any time you're working on something you don't want to lose, it's a good idea to save regularly.

To save a Corel Presentations slideshow, simply choose File, Save (or click the Save button on the toolbar, or press Ctrl+S). Supply a name, and Presentations saves the slideshow with the .shw filename extension. You can now rest in peace, knowing that your creation is safely saved.

If by chance you have an object selected when you try to save, Presentations will ask you first if you want to save the whole slideshow, or just the selected element. Generally, you want to save the entire file, but you can save individual elements. This is particularly handy if you've created a nifty graphic image that you want to save for future use.

Let's face it. We live in a PowerPoint world, and if you want to share your slideshow with others, you may have to convert it into PowerPoint format. If so, simply choose File, Save As, and from the File Type drop-down menu, choose MS PowerPoint 97/2000/2002/2003. The resulting file then can be opened in PowerPoint.

NOTE

> Not all Presentations features save cleanly in PowerPoint format. The simpler the slideshow, the more likely it will be the same in PowerPoint. Before sending the converted file to someone else, you might need to open it in PowerPoint and make minor adjustments.

PRINTING SLIDES

Most people don't realize that PowerPoint and other presentation programs were designed originally to create printed overhead transparencies. Although data projectors are increasingly available, there will be times that you'll need to print some or all of the slides of your presentation.

To access Presentations's printing options, choose File, Print. Presentations displays the Main tab of the Print dialog box (see Figure 30.10). Options here include the same ones found in WordPerfect, including printers, printer properties, and number and order of copies. You can also print the entire slideshow (Full Document), the current slide (Current View), a range of pages, or only selected objects (if you have selected objects).

Figure 30.10
The Presentations Print dialog box is similar to the WordPerfect Print dialog box, with a few Presentations-specific options.

Printing Handouts

In the Print Range section, you also find these Presentations-specific options:

- **Handouts**—After you select this option, you can also choose how many slides you want to display on each handout page, up to 16 per page. Click the Print Preview button to see what this will look like (see Figure 30.11). Press Esc to return to the Print dialog box.

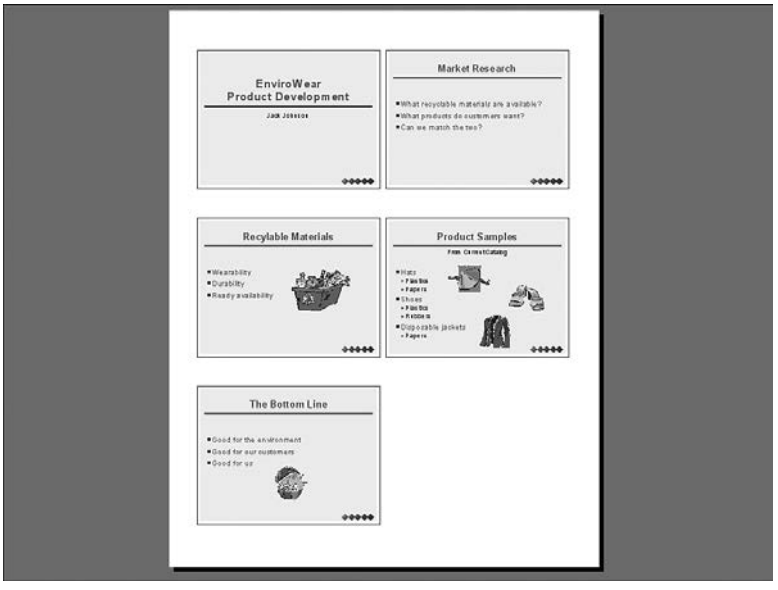

Figure 30.11
Print Preview enables you to see the results or your printing options, such as handouts, without wasting paper on unintended choices.

- **Speaker Notes**—This option prints thumbnails of the slides along with any speaker notes you may have prepared. This can be useful to you as a presenter, or as a summary for handing out to your audience (see Figure 30.12).

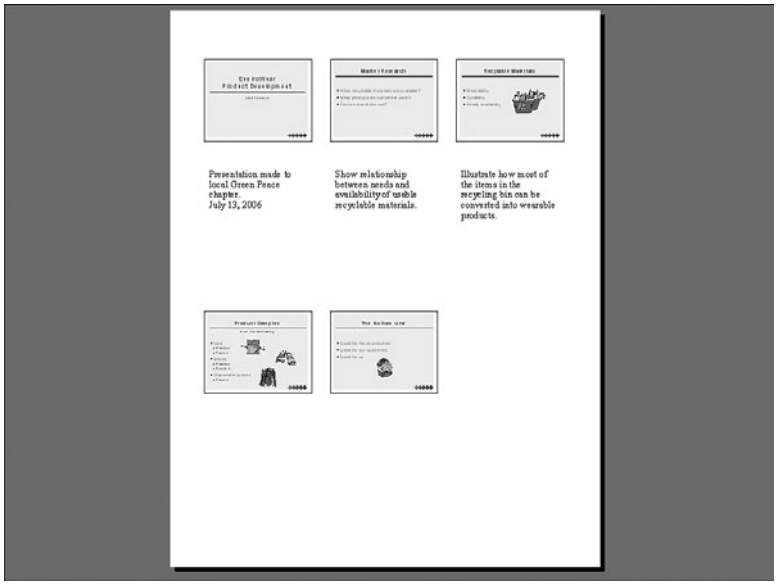

Figure 30.12
Speaker notes are thumbnails of the slides along with notes to yourself about what to say or how to present.

- **Audience Notes**—This also prints thumbnails of the slides, along with blank lines where audience members can write their own notes (see Figure 30.13).

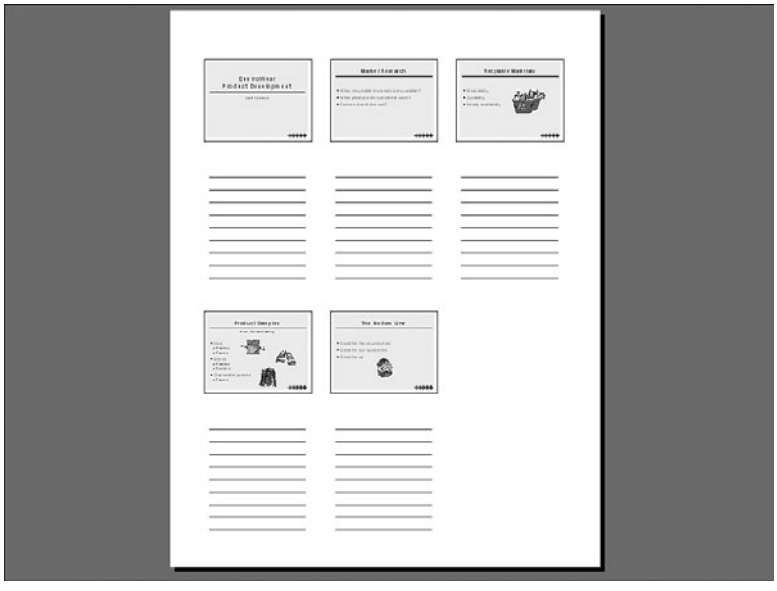

Figure 30.13
Audience notes are condensed handouts, with space for audience members to take notes.

With any of these options, you can click Preview to see what the results will look like, or click Print to print the document.

NOTE

> One of my pet peeves is going to a presentation only to receive a sheaf of printed handouts, one slide per page. What a waste of paper!
>
> Take a more environmentally friendly approach by printing multiple slides per page, and by enhancing the printout with your own comments (speaker notes) or at least a place for the audience to take their own notes.

PRINTING TRANSPARENCIES

Depending entirely on technology for your presentation can be dangerous, especially if your computer or data projector decide to act up.

If you print overhead transparencies of key slides, you'll be prepared to make your presentation with just an overhead projector. If the audience is small enough (about a dozen people), you can even just show printed paper copies of the slides should technology fail you.

To print overhead transparencies, you first need the right kind of transparency sheets for your printer. Laser transparencies need to be able to withstand the heat that laser printers generate. Inkjet transparencies have a special coating that allows the ink to dry. Although these transparencies cost more, they won't mess up your printer, and they'll allow you to have a backup set of slides.

OTHER PRINT OPTIONS

The Layout tab of the Print dialog box provides the same options found in WordPerfect, including scaling, and double-sided or booklet printing.

The Advanced tab of the Print dialog box (see Figure 30.14) enables you to choose whether to print in color or black and white, whether also to print the design background, and whether to add slide titles and numbers to your full-sized slide printouts.

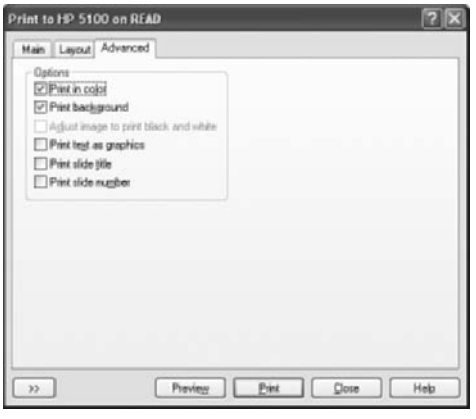

Figure 30.14
To conserve ink, you can choose to print your handouts in black and white, or without the background design.

Don't forget that you can click Preview to see what the results will look like, or click Print to print the document.

EXITING PRESENTATIONS

Getting out of Presentations is simple… almost. If you close the current document, Presentations takes you back to the PerfectExpert dialog box. From there you have to go through all the steps to open a slideshow, even if you click Close.

To exit Presentations completely, select File, Exit (or press Alt+F4 or click the application Close button).

If you seem to be in an endless loop, always ending up in Presentations, see "I Can't Seem to Get Out of Presentations" in the Troubleshooting section at the end of this chapter.

TROUBLESHOOTING

ELIMINATING THE PLACEHOLDER

I don't want to use a subtitle on my slide. How do I get rid of the placeholder?

Although you can select and delete a placeholder, you don't need to. Any unused placeholder does not display when you play your slideshow.

FINDING A SLIDE

I can't find a slide that I was sure I created. Where is it?

Looking at your slideshow sequentially makes it easy to miss a slide that may be there, especially in long slideshows. Try going to the Slide Sorter view where you can seem more slides at a time and where it might be easier to scan for the slide you're missing.

GETTING OUT OF PRESENTATIONS

I can't seem to get out of Presentations. What am I missing?

When you close a Presentations document, you're automatically taken back to the PerfectExpert screen and you have to work through the dialog boxes, even if you choose cancel, until you get to Presentations again.

To get out of Presentations, choose File, Exit, or click the application close button (not the document close button).

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CHAPTER 31

Creating Slideshow Content

In this chapter

by Read Gilgen

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Organizing a Presentation

Although it's tempting to jump right in and start creating a slideshow, remember that even the most experienced presenters take time to organize their material before creating their presentation. Pre-presentation planning considerations include knowing your audience, determining the purpose for your presentation, and selecting appropriate content.

Focusing on the Audience

Unless you're already an experienced teacher or public speaker, you may not be aware of the importance of sizing up the audience before you even start preparing a presentation. If you don't know who you're speaking to—what they want to know or what will keep their interest—it makes little sense to jump in and create a slideshow. Sure, you might prepare something entertaining, but will the folks in the audience walk away better informed or motivated than they were before you spoke to them?

On the other hand, when you know who your audience is, selecting the right elements and organizing your presentation becomes a much easier task.

So how do you determine who your audience really is? These are some of the characteristics to consider:

- **Age**—Are the audience members children, teens, young professionals, or seasoned veterans? Speaking down to young adults can be as disastrous as speaking over the heads of children.
- **Experience**—What experience do members of the audience have with what you'll be talking about? If it's a technical presentation, how much background do you have to cover before the audience can understand? How much "shorthand" (terminology that assumes prior knowledge) can you use?
- **Interest**—Why are the audience members there? Are they eager students or lumps of unmotivated humanity? Are they team members interested in success or skeptical outsiders looking to be convinced?
- **Motivation**—What's in it for the audience members? Do their grades depend on what you say? Does their financial future rest on the quality of the information you give them?
- **Technology background**—Are they from the old school, expecting verbal presentations more than snazzy charts and pictures? Or have they experienced lots of visual programs and therefore expect the quality of your presentation to match their experience? Are they, as some have called them, the "MTV Generation?"
- **Familiarity**—Are these people you know, and might they cut you some slack as a result? Or are they total strangers, who may or may not be willing to give up their time unless what you have to say is really worth it? Conversely, are they so familiar with you that they don't afford you the courtesy you deserve, feeling free to interrupt or divert the presentation?

- **Your background**—Are you the kind of expert or authority who commands respect even before you start? Or are you an unknown who has to establish your credibility before the audience will put stock in what you say?

As you can see, this partial list underscores the complex nature of determining who your audience is. One type of presentation definitely won't work for all audiences. Understanding your audience first determines what and how you prepare, and it is a key factor in your success or failure.

WHAT'S THE PURPOSE OF THE PRESENTATION?

After you figure out who your audience is, you then have to determine why you're making the presentation. Perhaps it seems obvious to you, but consider this: Even if you know what you're presenting (for example, a business plan), do you know why? Is it to convince your audience (for example, senior management)? Is it to inform and motivate (for example, your co-workers or subordinates)? Is it to assuage stockholders? Knowing the subject is great, but knowing why you're presenting it is important as well.

DETERMINING WHAT TEXT TO USE

Determining the textual content of a presentation is as much art as it is formula. Presentations is designed more to summarize or suggest ideas or topics than it is to fully describe them in excruciating detail. Less verbal material is usually a safe bet. Never create long written lists that you read to your audience.

Some situations do call for large chunks of text (for example, a quote). Even then, however, just how much of the quote needs to appear on the slide? Can you use an ellipsis (…) with only the salient parts of the quote on the slide, while verbally presenting the entire quote?

In short, with Presentations you should use words more as symbolic representations than as fully expanded narratives.

USING APPROPRIATE VISUAL MATERIAL

Graphic material, used appropriately, can be even more effective than words in communicating information that people can remember. For example, corporations spend millions of dollars developing simple graphical logos to help your mind remember their products.

Unfortunately, many presenters view graphics merely as window dressing, often using clip art images gratuitously. As you contemplate these presenters' slides, you find yourself trying to figure out why a particular graphic image was used. In the meantime, you miss the point of the slide or what the speaker is saying to you.

Students, especially younger ones, expect graphic material, and the liberal use of clip art can help hold their attention as well as enhance comprehension. However, you have to be more careful with older audiences. If you're going to use visual material, it had better be good and have a purpose. A poorly conceived data chart, for example, will only confuse and distract. A well-designed chart, on the other hand, can reduce the time you spend explaining because audience members can use the chart to easily make connections between facts and concepts.

Holding the Audience's Attention

For any successful presentation, you need to present information that is relevant, timely, and interesting. You can entertain all you want, but if the audience members walk away saying "So what?" you've probably failed.

You also need to remember that not everyone learns the same way. Some people learn best by reading words. Others do better with visual images. Some respond to auditory information.

The key, then, to holding the audience's attention is to vary the way you present your information. You should change from bullets, to graphs, to sound clips, to illustrations, and so on. Too much of any one thing can bore an audience.

I've also found that a periodic unexpected change of pace can wake up an audience. For example, say you're plodding through your presentation, displaying one bullet at a time. But suddenly as you finish a bullet point that summarizes a drop in the market, you use a sound effect or motion image to simulate falling. Even the most jaded or stuffy audiences will respond to a periodic, well-chosen, audio-visual effect.

Ultimately, once again, you need to know your audience. An engaging presenter can hold most audiences spellbound without using anything more than voice and gestures. For the rest of us, using Presentations appropriately can help us hold the audience members' attention while increasing their comprehension and ability to remember what we tell them.

Creating Content by Outlining

You could, like most people do, simply jump in and start creating slides. However, in my own experience, confirmed by many presenters and teachers I've worked with, good presentations require even greater organization and preparation than typical, off-the-cuff boardroom or classroom discussions.

Using Outlines from WordPerfect

One really useful feature in Presentations is its capability to convert WordPerfect outlines into Presentations slideshow outlines. To insert a WordPerfect outline, follow these steps:

1. Choose Insert, File.
2. Browse to find the WordPerfect outline.
3. Click Insert and Presentations converts the outline for use in Presentations (see Figure 31.1).

Two caveats:

- If you're planning to use the WordPerfect outline as you present, you really need to make sure it's polished and ready to go. Otherwise you'll be making changes to your slide and your outline independently of each other, and after a while they may not match.

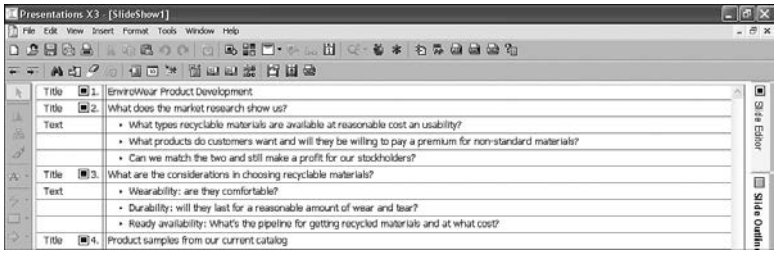

Figure 31.1
A WordPerfect outline converts easily to a Presentations outline, but you may have to reduce the amount of text before you can use it in a slideshow.

- Typically, the amount of text in WordPerfect outline topics is way too much for a Presentations slideshow. You'll want to look for ways to edit your text to short bullets, or to rephrase what's in your outline. Consider, for example, Figure 31.2, which compares two bulleted lists, one of which has too much text for a slideshow.

Figure 31.2
Good Presentations slides contain minimal text, allowing the presenter to fill in needed information.

USING PRESENTATIONS'S OUTLINE EDITOR

You can also create and edit outlines directly in Presentations by using Presentations's Slide Outliner view.

To create a typical slideshow starting from the Slide Outliner view, follow these steps:

1. Create a new slideshow. It doesn't matter whether you select a design at this point or not.
2. Click the Slide Outliner tab at the right of the screen. Presentations displays a blank sheet that looks like a notebook page (see Figure 31.3). Note that an icon representing the first slide appears, with a prompt in the left margin telling you what is to be represented by the text you type, for example, a title.

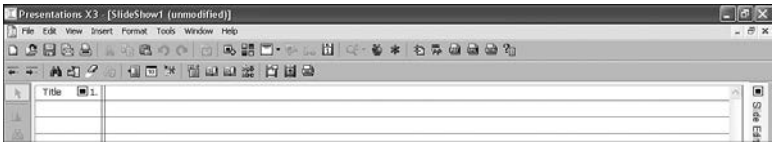

Figure 31.3
The Slide Outliner view enables you to focus on textual content alone.

3. Type the text for the slideshow title, for example, **`EnviroWear Product Development`**.
4. Press Enter and Presentations automatically moves to the next line, prompting you for a subtitle.
5. Type the subtitle, for example your name, and press Enter. Because the first slide layout is a title slide, Presentations knows it is through with this slide and automatically creates a second slide, using the Bulleted slide layout.
6. Type the title of the second slide, for example, **`Market Research`**.
7. Press Enter to display the subtitle. However, this time you want to skip the subtitle, so press Enter again.
8. Presentations now displays the first bullet of a bulleted list. Type the text of the bullet and press Enter to add another bullet.
9. Continue adding bullets until you're ready for another slide.
10. On a blank line (only the bullet shows), press Shift+Tab, or click the Previous Level button on the properties bar. Because the level to the left of the bullet is a top, or new slide level, Presentations displays another slide icon.
11. Repeat steps 6–10 until you finish the content of your slideshow.

Inevitably you'll need to edit, correct, insert, delete, or rearrange the content of your slideshow. Some of the options and tools available include

- Use typical editing procedures to correct, delete, or insert bits of text, or cut, copy, and paste from one location to another.
- To insert a new slide, click anywhere in the text of the slide you want to follow, and choose Insert, New Slide, or press Ctrl+Enter. Presentations adds a new slide following the current one.
- To add a bullet, position the insertion point at the end of a bulleted line and press Enter.
- To change a bullet level to the next level, for example, to make a subbullet, click the bulleted line and press Tab, or click the Next Level button on the properties bar.
- To change a bullet level to the previous level, click on the bulleted line and press Shift+Tab or click the Previous Level button on the properties bar.

NOTE

> Outline levels can be confusing, at least initially. If you move a top-level bullet to the previous level, you in fact move it to the margin, thus creating a new slide. If you move a slide title to the next level, you in fact lower its value and it becomes a bullet for the preceding slide.
>
> As you experiment with outlining levels, you'll soon begin to understand how to create hierarchical text relationships.

- To rearrange slides, or bullet items, simply click and drag the slide or bullet icon. Presentations displays a short red horizontal line to indicate where the slide or bullet will end up when you release the mouse button (see Figure 31.4). This drag-and-drop feature makes it extremely easy to change the order of slides or bullets, or to move bullets from one slide to another.

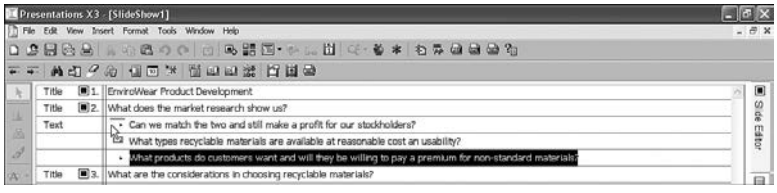

Figure 31.4
Rearrange slide outline content by dragging and dropping slide or bullet icons.

TIP FROM

Read Gilgen

> Don't forget that you can use copy and paste to replicate slide titles or bullets, so you don't have to retype repeated elements. You can also copy elements by holding down the Ctrl key while dragging and dropping title or bullet items.

After you carefully check your outline for content and organization, you're finally ready to begin formatting your slides and your slideshow. Up until now, however, the Slide Outliner has helped you avoid the temptation to worry about the look of your slides, allowing you to focus on content.

Has a slide disappeared while editing your outline? See "Slide Missing?" in the Troubleshooting section at the end of this chapter.

USING SLIDES FROM ANOTHER SLIDESHOW

You can also "recycle" slides from other shows, thus possibly saving some preparation time. For example, to insert an entire slide into your current slideshow, simply choose Insert, File and browse to find the slideshow that contains the slides you want to use. Unfortunately, this imports all of the slides in a slideshow, although you may want only one or two slides. An easier method for importing just one or a few slides is to follow these steps:

1. Open the slideshow that contains the slides you want to use.
2. Go to the Slide Sorter view.

3. Select the slide or slides you want to copy.
4. Right-click one of the selected slides and choose Copy (or use other copy and paste options).
5. Return to your new slideshow in the Slide Sorter view.
6. Click the slide after which the inserted slides are to appear.
7. Paste the copied slides.

NOTE

Pasted slides assume the properties of the target slideshow, including background colors, layouts, font styles and colors, and so on. Some editing may be required to make copied content fit within the target designs.

CREATING TITLE BOXES

Nearly every slide has at least one text box, usually a title box, whose position and size are determined largely by the background and layout layers. Title boxes are nearly identical to regular text boxes, except that they appear automatically and are called placeholders to denote their purpose. Unused placeholder boxes do not appear when you play a slideshow.

ADDING, EDITING, AND FORMATTING TEXT

In Chapter 30, "Getting Comfortable with Presentations," you gained some experience adding and modifying text within a title box. For example, you learned the following:

- You double-click a text placeholder to begin adding or editing text. The box appears with hash marks (///) all the way around it and with six small boxes called sizing handles (you'll learn more about this in a moment). The hash marks indicate that you are in the text edit mode and that you can make changes to individual parts of the title box text (see Figure 31.5).

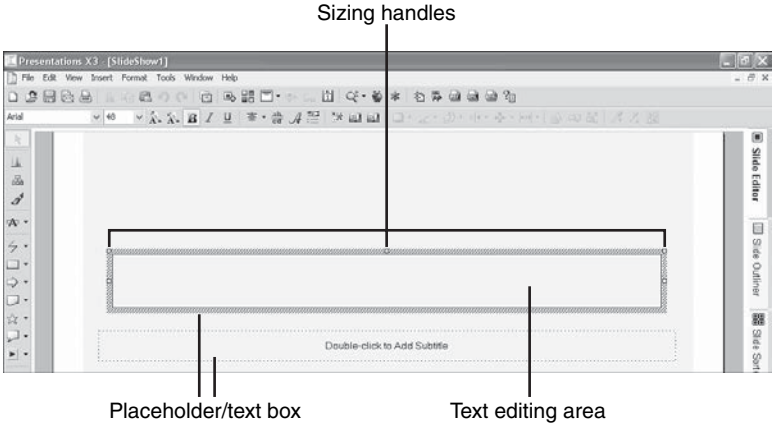

Figure 31.5
A text box is surrounded by hash marks and sizing handles when you're adding text to it.

- Within the title box, you can type, delete, select, and cut, or copy and paste.
- You can add text formatting and attributes—such as bold, italic, font style, or text color—to title box text.

MOVING AND SIZING TITLE BOXES

Although placeholders suggest where your title should appear, you can move and change the shape of a title box to better fit your slide content.

CAUTION

> If you don't have to move your title box, don't. Having the title in exactly the same place on each slide is less distracting than having titles that change location from slide to slide.

Suppose you find that the automatic placement of the title box placeholder isn't quite right for your needs. You can follow these steps to move a title box placeholder:

1. Single-click the title box to display its six sizing handles. If you accidentally double-click and enter text edit mode, just click outside the title box and then single-click it.
2. Hover the mouse pointer over the title box. When the mouse pointer turns to a four-way arrow, click and drag the box.
3. Release the mouse button to drop the box in its new location. Note again that the solid black sizing handles indicate that you're working with the entire box (see Figure 31.6).

Figure 31.6
When an entire text box is selected as an object, the sizing handles are solid black, and you can move the box anywhere on the screen.

4. Repeat these steps until the box is positioned exactly where you want it.

If you move the box slowly, you might see it "jump" instead of glide smoothly across the screen. This happens because Presentations automatically makes all objects, title boxes included, snap to grid. The screen area is invisibly divided into a grid of vertical and horizontal lines, spaced 1/16 inch apart. By snapping objects to this grid, Presentations helps you more easily align objects.

You can also change the size and shape of a title box by using the box's sizing handles. To do so, follow these steps:

1. Single-click the title box to display its sizing handles.
2. Move the mouse pointer toward a sizing handle until it turns into a two-way arrow.
3. Click and drag the sizing handle to change the shape of the box (see Figure 31.7).

Figure 31.7
You can use the sizing handles to change the size or shape of an object box.

Dragging a box's sizing handles produces the following results:

- Dragging a side sizing handle changes only the width of the box. Making a box more narrow may cause the text within it to wrap. Widening the box may allow text to fit on one line or on fewer lines. The title's font size does not change.
- Dragging a corner sizing handle changes both the width and height. This also changes the font size to fit proportionally within the box.
- Dragging any sizing handle while holding the Shift key enables you to distort the box. The text within the box gets larger or smaller, and also stretches (see Figure 31.8). For example, Shift+Drag downward makes the text taller and thinner. Unfortunately, a bug in Presentations distorts and overlays itself in unexpected ways, so using this method may not be terribly useful.

Figure 31.8
Holding Shift while dragging a corner sizing handle enables you to stretch the text, albeit in sometime unexpected ways.

- Once you distort the shape of the title box, only four sizing handles appear. If you double-click the box to edit the text, the box temporarily returns to its normal size. When you click outside the text editing box, it returns to its changed, distorted shape.

TIP FROM

Read Gilgen

If you hopelessly mess up your title box, you can start all over again. Just single-click the box and press Delete. The content disappears and the box reverts to its layout placeholder size and location.

CAUTION

Title boxes, like all text boxes, change font size when you drag corner handles. Unfortunately, this makes the text look different from other boxes or other slides. You can also inadvertently make text size too small to be seen well by your audience. Use discretion when considering a change in the size of a title or text box.

If your title box text suddenly appears upside down, see "Text Upside Down?" in the Troubleshooting section at the end of this chapter.

WORKING WITH BULLET BOXES

Bullet box placeholders are much like title box placeholders (see Figure 31.9). You can edit and format text within them, and you can move and size them just as you do title box placeholders. But they're also a bit more interesting because you can customize or animate bullets so that they display onscreen one at a time.

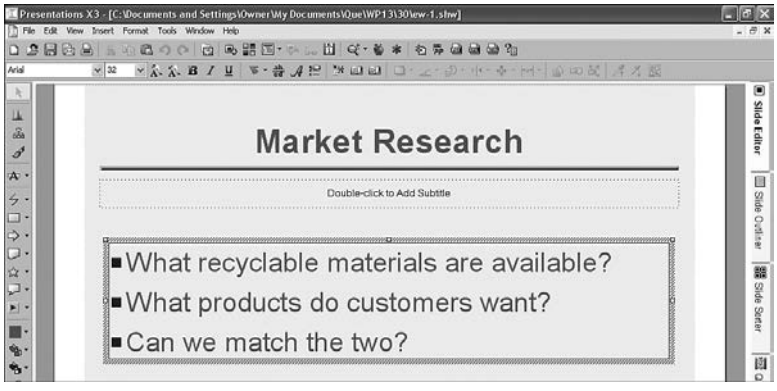

Figure 31.9
Bullet box placeholders look like title boxes except for the content.

In a bullet box, if you are in edit mode (in which the box consists of hash marks), format changes apply the same as they do in WordPerfect. For example, if you select text and click Bold, only that text is bolded. If you click Bold and then begin to type text, that text will be bold until you click Bold again to turn it off.

However, you also can apply format attributes to the entire box. First, click outside the box to deselect it; then single-click the box to select the entire box. Then apply the format you want, for example, Bold.

CUSTOMIZING BULLETS

Bullets, in the traditional sense, are simple, small dots that look like bullet holes. In Presentations, however, bullets can also be special characters or iconic symbols. The default bullet style for a slideshow depends on the background design. For example, the default no-design style gives you small black dots. The Book design gives you dark red stars for bullets (see Figure 31.10).

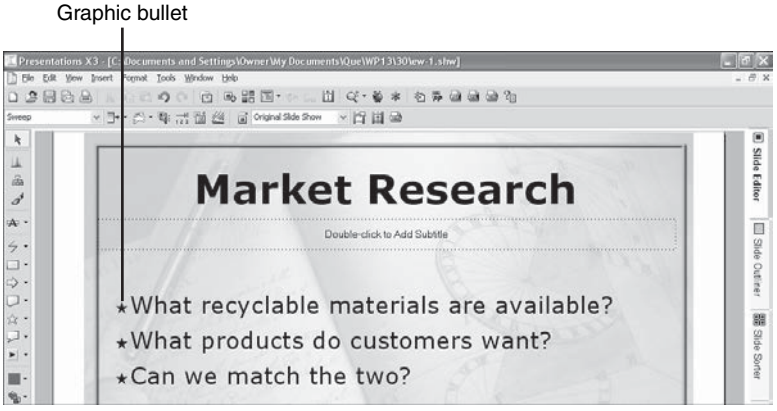

Figure 31.10
Each background design uses a predefined bullet style.

Sometimes the default bullet style just doesn't suit your tastes. It might be too snazzy or too boring. Or its color might not offer enough contrast to make your bullet points stand out.

To customize the bullet style for all the bullets in a single slide, follow these steps:

1. Click the bullet placeholder.
2. Choose Format, Bulleted List Properties (or right-click the bullet box and choose Bulleted List Properties). Presentations displays the Bulleted List Properties dialog box.
3. Click the Bullets tab to view options for customizing bullets (see Figure 31.11):

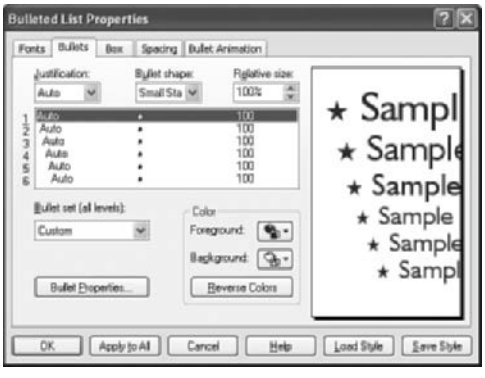

Figure 31.11
You can choose and customize bullets in the Bulleted List Properties dialog box.

- **Bullet Set**—click the drop-down menu to choose from several predefined bullet sets.
- **Justification**—Presentations automatically adjusts indentation levels, but you also can change justification to right, left, or center.
- **Bullet Shape**—Choose a shape from the drop-down list, or choose Other… to select a shape from WordPerfect's Iconic Symbols (see Figure 31.12).

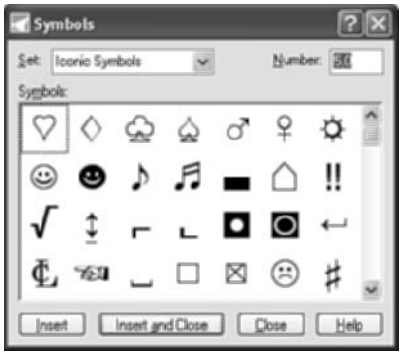

Figure 31.12
Presentations enables you to choose from several graphical bullet styles in the Iconic Symbols dialog box.

- **Relative Size**—Each successive sublevel is slightly smaller than the higher levels. If you increase the relative size, it becomes larger relative to that specific level.
- **Bullet Properties**—This option opens the Fill dialog box where you can choose patterns or gradient shading for your bullets.
- **Color**—You can choose different colors for the foreground or background of the bullet.

4. After you customize your bullet type, click OK to apply the new style to the bullets in the placeholder.

The changes you make to a bullet placeholder normally apply only to the current slide. If you want the same kind of bullets throughout a slideshow, simply click Apply to All and all changes you make in the Bulleted List Properties dialog box apply to all bulleted boxes throughout the slideshow.

CUSTOMIZING BULLET BOXES

Bullet boxes can be customized to include background colors or lines, or to change the spacing between bullets.

To customize the bullet box itself, access the Bulleted List Properties dialog box (Format, Bulleted List Properties) and click the Box tab (see Figure 31.13, which shows Position and Frame Style already selected).

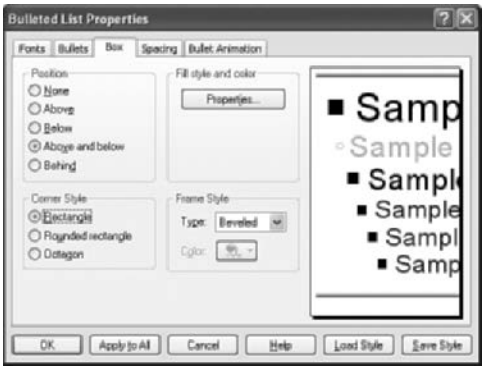

Figure 31.13
Custom Bullet box options help highlight your bulleted lists.

Custom Box options include

- **Position**—A framing line can appear at the top, bottom, or both, or the entire box can be backed by the chosen color and style.
- **Frame Style**—Lines can be single, double, beveled, or more, or have no style at all.
- **Fill Style and Color**—Choose the style pattern and color, although the default is designed to work well with your chosen slideshow background.
- **Corner Style**—Changes the corner shapes of the background.

For consistency, consider applying whatever box style you choose to all slides in the slideshow.

Although spacing between bullets is set optimally for viewability, you can modify spacing to spread things out, or to squeeze in an extra bullet. To change bullet spacing, access the Bulleted List Properties dialog box and click the Spacing tab (see Figure 31.14).

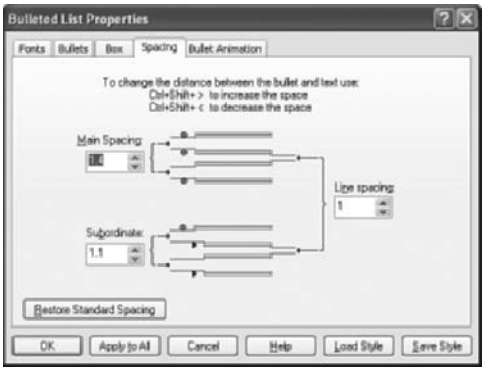

Figure 31.14
Change bullet spacing to squeeze in more bullets on a slide.

Simply adjust the spacing between main level bullets or subordinate bullets as desired. If you get far off track, you can always click the Restore Standard Spacing button and start over. Also, unfortunately, the dialog box does not provide a preview option, so you may have

to try several different settings, going back to the Slide Editor each time, to get just what you want.

Again, for consistency, consider applying whatever spacing changes you choose to all slides in the slide show.

ANIMATING BULLETS WITH PRESET ANIMATIONS

One very basic but powerful Presentations feature is the capability to animate bullet points. Animation simply means that something on the screen moves. For example, with bullets and their associated text, you can use animation to make them appear one at a time.

Animating bullets is more than just pizzazz. It helps keep your audience members focused by not allowing them to read ahead. It also helps them take notes so they know when you've moved to the next topic.

By default, Presentations bullets are automatically animated so that each bullet point "flies" in from the right of the screen, one at a time. This is a good, basic bullet animation that isn't too distracting. However, you can also customize bullet animations, including type of animation, speed, and sound effects.

To customize bullet animations, select the bullet box; then choose Format, Bulleted List Properties, and click the Bullet Animation tab (see Figure 31.15).

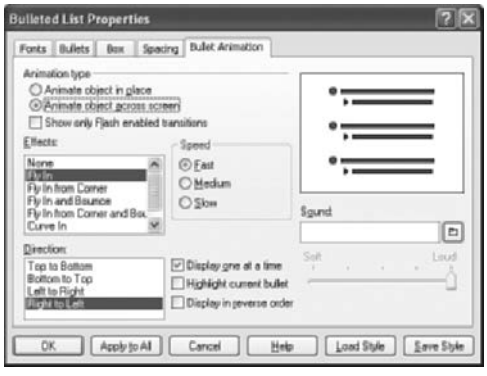

Figure 31.15
The Animation tab on the Bulleted List Properties dialog box enables you to animate the bullets in a variety of useful ways.

Bullet animation options include

- **Animation Type**—Animations in place depend on an effect to reveal the bullet, whereas animations across the screen actually move the bullet.
- **Effects, Direction**—Depending on the animation type you choose, the effects and directions will vary. You can also choose None to turn off animation altogether.
- **Speed**—Determines how fast the bullet appears. Be careful not to slow down animations too much or your audience, and you, will become impatient.
- **Display One at a Time**—By default, bullets appear onscreen one at a time. Uncheck this box if you want the entire bullet box to appear at once.

- **Highlight Current Bullet**—This option causes the current bullet to appear with the normal text font, but preceding bullets appear shaded, or dimmed. This can help highlight the bullet you're currently talking about.
- **Display in Reverse Order**—If you want to build to a climax, from the bottom up, use this option.
- **Sound**—You can associate sound effects with bullet animations. Simply browse to find a .WAV file and adjust the volume. All bullets on the current slide will use the same sound effect, so be judicious in what you use. What's cute once can quickly become quite obnoxious.

Using animated bullets can be fun, but you should also have a purpose in using them. Consider the following:

- A gentle movement with each bullet slide can create the subtle impression that something is happening, that progress is being made.
- Wild movements all the time can give the impression that you're trying to show off or that entertaining is more important than communicating.
- Using animated bullets requires you to advance each bullet. This works well if you plan to spend some time on each bullet item. However, if you have lots of information to cover and you might give only cursory attention to a slide of bullets, you should probably select None for the Effect so that the entire bullet box appears at once.
- Avoid the temptation to use different animation schemes for each bullet slide. Instead, select an animation you're comfortable with and apply it to all slides. Otherwise, your audience will try to guess what bullet animation you'll use next instead of focus on what you're trying to communicate.

Adding Text Boxes

In addition to title, subtitle, and bullet boxes, you can add other text boxes to a Presentations slide. Such boxes behave the same as these predefined boxes, and enable you to add information that may not neatly fit within the existing layout.

An added bonus, and a big advantage over traditional word processing text, is that Presentations text boxes enable you to represent text graphically. Customized text can include the following:

- Text rotated at any angle
- Gradient shaded text
- Text shaped to curved objects
- Three-dimensional text
- Text warped to fit predefined shapes

NOTE

All of the text box options available in Presentations are also available in WordPerfect via the Draw program. Simply choose Insert, Graphics, Draw Picture. WordPerfect opens a drawing screen and displays the Presentations toolbars, whereupon you can use all of the procedures described here.

For example, in WordPerfect you can rotate text in text boxes only in 90-degree increments. However, if you want to angle text at 45 degrees, you need to create the text in Draw and add the graphics box containing the text to your document.

To create a text box in Presentations, follow these steps:

1. Click the drop-down menu or the Text Objects button on the Presentations tool palette to display text options (see Figure 31.16), which include the following:

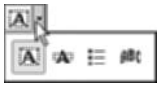

Figure 31.16
Presentations offers a variety of ways to create text objects.

- Create a text box when you want to create more than one line of text.
- Create a text line when you want to limit the text to just one line.
- Create a bulleted list.
- Create text with special effects, using WordPerfect's TextArt.

TIP FROM

Read Gilgen

Often, working with text lines, rather than text boxes, is more efficient in the long run because you can rotate and rearrange text more easily.

2. Click the tool you want (for example, text line) and move the mouse pointer to the area of the screen where you want to start the text line. Note that the mouse pointer becomes crosshairs (or a hand and a box, if you're creating a multiline text box).
3. Click to begin the text line.
4. Type the text.
5. Select the text and change or add formatting, such as font, size, and bold, or other attributes.
6. To close a text box, click anywhere outside of the box. To close a single line of text, you can also just press Enter.

You may want to make other adjustments to the size or shape of the text. For example, you can drag the sizing handles of a text box to make the text larger or smaller. To size a text object, follow these steps:

1. Single-click the text box you want to size. Note that single-line text boxes display only four sizing handles, whereas multiline text boxes display six.
2. Drag any of the sizing handles to enlarge or reduce the text proportionally.
3. Hold down the Shift key while dragging a sizing handle to stretch the text horizontally or vertically (refer to Figure 31.8).

To rotate a text object, follow these steps:

1. Single-click the text box you want to rotate to select it.
2. Click the drop-down menu on the Rotation Options button on the toolbar, and choose Manual Rotation, or right-click the object and choose Rotate from the QuickMenu. Presentations places rotation and skewing handles around the outside of the text box, and an axis in the center of the box (see Figure 31.17).

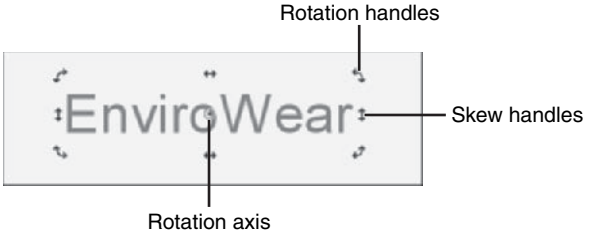

Figure 31.17
You can rotate text at unlimited angles in Presentations.

3. Drag a corner handle to rotate the text on its axis (see Figure 31.18).

Figure 31.18
When you drag a rotation handle, Presentations displays an outline showing where the image will end up when you release the mouse button.

4. Drag a side handle to skew the text (see Figure 31.19).

Figure 31.19
You can drag a side handle to skew the text, and Presentations previews the location of the skewed object.

NOTE

If you're working in WordPerfect's Draw screen, before returning to your document, you should make the Draw screen approximately the same size as the text box. The borders of the Draw screen become the borders of the graphics box that contains the special text, and you don't want too much empty space between the text and borders of the box. Simply move the text object to the upper left of the Draw screen, and then drag the sizing handles of the Draw screen to fit the text box. Click in your document to close the Draw screen.

TIP FROM

Read Gilgen

Remember that Presentations elements such as text boxes and graphic images can be created within WordPerfect's Draw program.

MODIFYING TEXT APPEARANCE

In WordPerfect you can change a font's style and color. In Presentations you can make many other changes as well. To modify a text object in Presentations, or in WordPerfect's Draw program, select the text object and choose Format, Font. Alternatively, you can click the Font button on the properties bar, or press F9, or right-click the object and choose Font. Presentations displays the Font Properties dialog box, which offers a wide range of font options.

The Font tab (see Figure 31.20) enables you to choose font type (Face), size, color, and other basic attributes, and to preview the results.

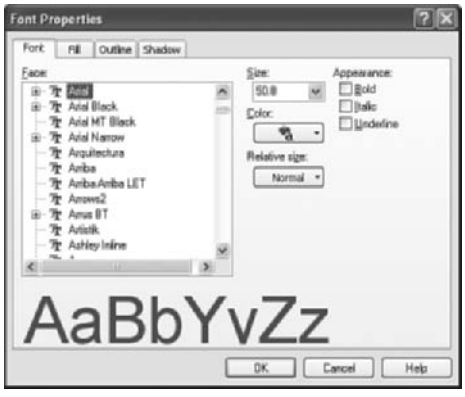

Figure 31.20
You can use the Font tab of the Font Properties dialog box to modify text objects in Presentations.

➔ For information on using fonts, **see** "Choosing the Right Font," **p. 62**.

The Fill tab (see Figure 31.21) offers three Fill Style options:

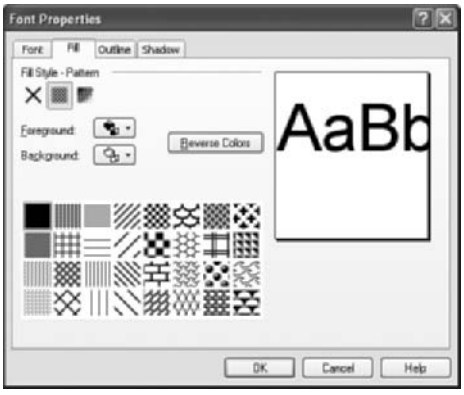

Figure 31.21
With the Fill tab, you can use solid colors, patterns, or gradient shading.

- **None**—Click this button (the button with the large X) to display only the outline of the text.
- **Pattern**—Click this button (the default, refer to Figure 31.21) to choose from a palette of pattern choices. Foreground color is the pattern color, and Background color is what shows through the pattern. You can reverse the colors for a negative effect.
- **Gradient**—Click this button to choose from a palette of gradient shaded fills (see Figure 31.22). You can also use Reverse Colors to switch the order of the gradient colors. To customize gradient settings, click Gradient Settings to display the Gradient Settings dialog box (see Figure 31.23), where you can change the angle (for example, 45 degrees to match rotated text), or the horizontal offset or vertical offset (where the foreground color is the stronger color). You can even specify the exact number of steps in the shading, although the default is the smoothest.

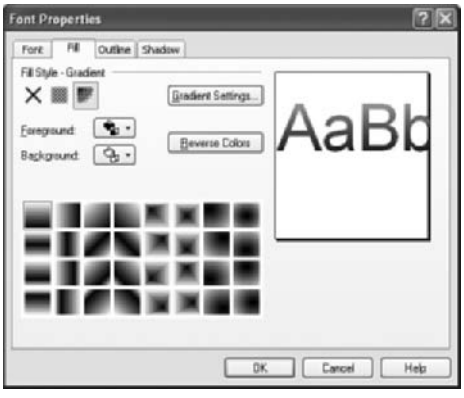

Figure 31.22
You can quickly select from among several preset gradient styles from the fill style gradient palette.

The Outline tab (see Figure 31.24, which shows the style palette selected) enables you to change the color, style (for example, solid or dashed), or thickness of the line that surrounds the text. You can also choose None (the large X) from the style palette to remove the font border line altogether.

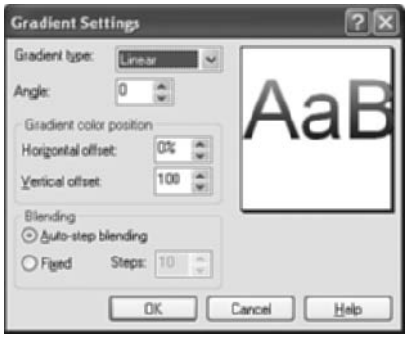

Figure 31.23
You can customize gradient shading in text in the Gradient Settings dialog box.

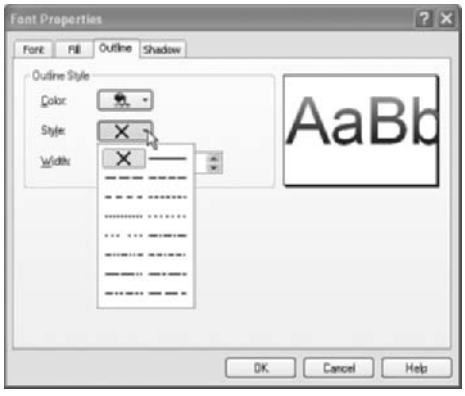

Figure 31.24
You can choose X (None) or one of the line styles from the line style palette.

The Shadow tab (see Figure 31.25) enables you to create a shadow for the text in any direction you select. You then can further define the shadow offset by dragging the scrollbars or by specifying a measurement in the counter boxes. Finally, you can change the shadow color and make it transparent (objects from behind the shadow can be seen) or not transparent (the shadow is a solid color).

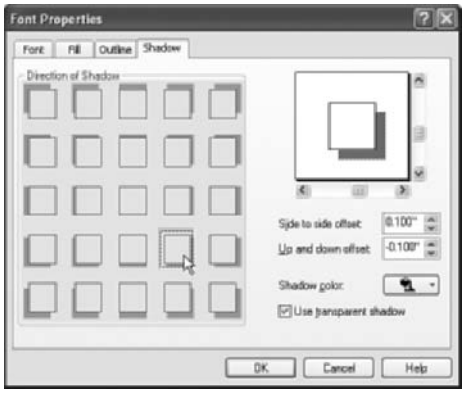

Figure 31.25
It's easy to add or customize shadows on the Shadow tab of the Font Properties dialog box.

NOTE

> Shadow transparency works only with other objects on Presentations slides or drawings, or in the WordPerfect Draw screen, but not with text or other objects in a WordPerfect document.

When you finish your text modifications, click OK to return to the Presentations screen. An example of text changes you can make in Presentations is shown in Figure 31.26, where the text has gradient shading, no border line, and a transparent gray shadow.

Figure 31.26
It's easy to customize text, as in this text that displays a different font, gradient shading, no border line, and a transparent gray shadow.

ADDING SPECIAL EFFECTS TO TEXT

Choosing the Create Text with Special Effects option on the Text Objects Tool button opens the WordPerfect TextArt program, described in Chapter 13. This tool enables you to fit text into predefined shapes, with a variety of customizing options.

➔ For information on using WordPerfect's TextArt program, **see** "Creating TextArt," **p. Web:30**.

In addition to TextArt, Presentations includes two special-effects options that apply to text as well as to other graphics objects. Quick 3-D adds dimension and shading to text, and QuickWarp fits text into a predefined shape.

To access the Quick 3-D dialog box, select the text object and choose Tools, Quick 3-D (see Figure 31.27). The options you use depend on the look you're trying to achieve. Options include the following:

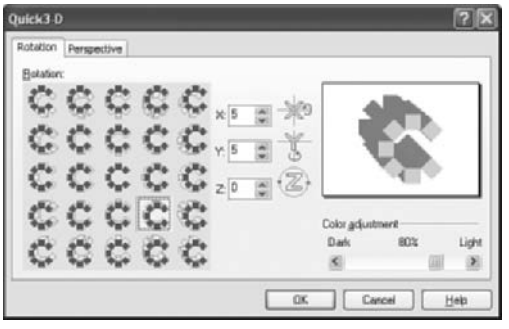

Figure 31.27
You can add 3D effects to text from preset or customized styles in the Quick 3-D dialog box.

- **Rotation**—You can click a predefined rotation angle, or make your own adjustments to the X, Y, or Z axes of the letters.
- **Color Adjustment**—The percentage of color applies to the face of the letters. The 3D shadow is automatically made proportionally darker.
- **Perspective**—On the Perspective tab (see Figure 31.28), you can choose Linear, Parallel, or Inverse, as shown by the samples.

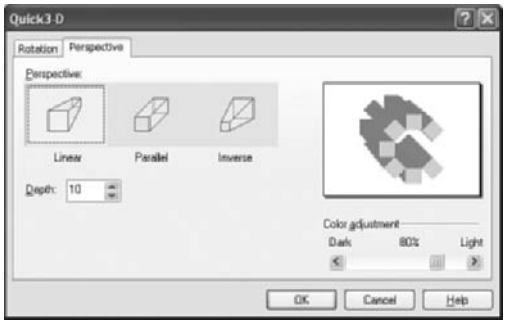

Figure 31.28
You can change the 3D perspective on the Perspective tab of the Quick 3-D dialog box.

- **Depth**—Also on the Perspective tab, you can specify how deep the 3D effect should be.

CAUTION

> The Quick 3-D feature converts text to a bitmap object, which means you lose your usual text editing tools. The only way to return such an object to text mode is to use Undo, or to delete the object and start over again with another text box.

The QuickWarp feature is similar to TextArt, but with only limited options. When you warp text, you make it change its shape to fit another predefined shape. Choose Tools, QuickWarp to display the QuickWarp dialog box (see Figure 31.29, which shows a shape selected). You can click a shape, preview it, and click OK to add the effect to your text.

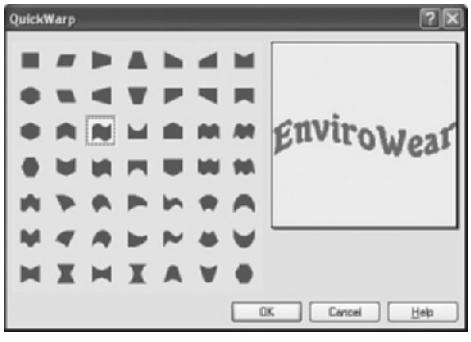

Figure 31.29
You can warp text to fit a predefined shape in the QuickWarp dialog box.

TIP FROM

Read Gilgen

You can add both the QuickWarp and the Quick 3-D effects to a text or graphic object. For added effect, you can also apply either effect more than once to the same object.

If you want to edit your text but can't seem to do so, see "How Come I Can't Edit My Text Box?" in the Troubleshooting section at the end of this chapter.

CONTOURING TEXT TO SHAPES

You can contour text to other shapes, such as circles, half-circles, or even flat-sided objects. To contour text to the outside of a circle, for example, follow these steps:

1. Create the text line you want to contour.
2. Create the shape you want the text to contour to—for example, a circle, created from the Basic Shapes button on the tool palette.
3. Select both the text and the shape. If they are the only two objects on the Presentations screen, you can choose Edit, Select All. If there are other objects on the screen, click the shape object, and then hold down the Ctrl or the Shift key and click the text object. You must pair one shape object with each text object you contour.
4. Choose Tools, Contour Text. WordPerfect displays the Contour Text dialog box (see Figure 31.30).

Figure 31.30
You can use the Contour Text dialog box to contour text to another Presentations shape.

5. Choose the text position from the Position Text drop-down menu. Choices include Top Left, Top Center, Top Right, Bottom Left, Bottom Center, and Bottom Right.
6. If you want to display the contoured text without the graphic object, leave the Display Text Only box checked.
7. Click OK to contour the text (see Figure 31.31).

Figure 31.31
You can hide or leave visible the object to which text is contoured.

Some contoured text looks quite awful, but that's only because of the screen display. The printed result looks nice and clean.

NOTE

> Certain software features work better in theory than in principle. Contouring text is one such feature. Single contoured objects seem to work quite well, but if you contour more than one text object (refer to Figure 31.30), you may encounter several problems. One is that one of the objects may not display properly. Another is that one of them may not print at all, even if it does display. Contouring to multisided shapes can also prove problematic.
>
> Contouring text can be a cool, useful feature. But be aware that you may have to do a lot of experimenting to get what you really want, if you can get it at all.

USING WRITING TOOLS

Spelling and grammar errors can creep into a slideshow just as easily as they do in a WordPerfect document. Fortunately, the same familiar tools that help find those errors in WordPerfect are available in Presentations. These include

- Spell Checker
- Grammatik
- Thesaurus
- Dictionary
- QuickCorrect

Learn how to use these tools, and take advantage of them. Not only can you avoid embarrassing mistakes onscreen, but you can use the thesaurus or dictionary to find just the right key words to use in place of more verbose onscreen explanations.

➔ For information on using WordPerfect's and Presentations's writing tools, **see** "Using the Writing Tools," **p. 109**.

Troubleshooting

Slide Missing?

After editing a bunch of slides, suddenly one of my slides seems to be missing.

Certainly you may have deleted the slide accidentally while in the Slide Sorter view, or by deleting text while in the Slide Outliner view.

Another, more probable explanation is that while in the Slide Outliner view, you may have moved a slide title to the next level, probably by pressing Tab. This makes the slide and its contents part of the preceding slide.

Check your slides to see if one of them seems to have the contents of two slides. Then in Slide Outliner view, click what should be the title of the next slide and press Shift+Tab, or click the Previous Level button.

Text Upside Down?

I was trying to size my text box and suddenly the text appeared upside down.

If you drag a bottom corner sizing handle too high, you flip the box vertically. The same thing happens if you drag a top corner sizing handle too low. To unflip the text, just drag the sizing handle back down (or up) until the box flips back.

How Come I Can't Edit My Text Box?

I created a text box, but after fiddling with it and adding special effects, I can no longer edit its text.

Anytime you add special effects, such as Quick 3-D or QuickWarp, you convert the contents of the box to a bitmap graphic image. If you can't undo the special effects, you'll have to delete the box and start over again.

CHAPTER 32

Working with Graphic and Multimedia Elements in Presentations

In this chapter

by Read Gilgen

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Working with WordPerfect Clip Art

Presentations is a visual medium, and therefore, creating slideshows in Presentations is akin to an artistic experience. Adding titles, bullets, and other text is a start, but graphic images and drawing objects add the art to your slides. Of course, you can create beautiful slides that impress but don't communicate. But used properly, graphic elements can get across ideas that words alone might not be able to.

NOTE

> The procedures described in this chapter and the next work equally well in Presentations Slide Shows or Presentations Drawings, or in the WordPerfect Draw program. For more information on the Presentations Drawing program, see "Working with Slide Presentations Versus Drawings," later in this chapter.

Adding WordPerfect Clip Art images

One readily available source for graphic images is WordPerfect Office X3's own collection of clip art. Chapter 12, "Adding Graphics to Your Document," describes in detail how to use WordPerfect's clip art, including the extensive CD collection of more than 10,000 images. You select, add, move, and manipulate clip art images the same way in both WordPerfect and Presentations. However, consider these differences:

- You typically add images to the slide layer, meaning that they cover the background and layout layers.
- Slide images don't cause text wrapping as they do in WordPerfect. You "insert" images in WordPerfect, but "add" them as a layer in Presentations.
- Clip art images in Presentations slides or Presentations drawings are directly editable, unlike in WordPerfect where you double-click an image just to go to the Draw program (actually Presentations) where you then edit the images.

➔ For more information on adding WordPerfect's clip art images, **see** "Inserting Graphic Images," **p. 308**.

Working with Graphic Layers

If you add more than one graphic element at the same location, you create layers of graphics. The bottom layer is the image you added first, and the top layer is the graphic you added most recently. Presentations also helps you specify the order of the graphics layers.

By changing the size and order of the objects in the layers, you can combine graphics into rather interesting and effective images. For example, in Figure 32.1, four clip art images are shown in their original size. If you want to create a stack of dollar bills, make that and the stack of gold bullion proportional to Scrooge, and place a dollar bill floating behind him, you must change the order of the layers.

Figure 32.1
Four graphic images have been added to the slide, layered one of top of another, at their original size.

If you accidentally double-click an image, see "How to Get Out of the Draw Screen" in the Troubleshooting section at the end of this chapter.

To change the order of graphic object layers, follow these steps:

1. Click the object you want to change (for example, the flying dollar bill object).

TIP FROM

Read Gilgen

If you select an image, but the sizing handles don't seem to match the graphics box for that image, click again until you select the correct box. This works even if the box you want to select is hidden behind another image.

2. Choose Edit, Arrange, Order, or click the drop-down menu on the Order button on the property bar.
3. From the menu choose one of the following options:
   - **To Front**—This moves the object all the way forward, to the top layer.
   - **To Back**—This moves the object all the way backward, to the bottom layer.
   - **Forward One**—This moves the object forward only one layer. Other objects may still remain on top of or in front of it.
   - **Back One**—This moves the object back only one layer, so other objects may remain beneath or behind it.

Repeat steps 1–3 until all the objects are in the proper order.

NOTE

You can right-click the object, but the QuickMenu offers only the options To Front or To Back. For more control, use the Order button on the toolbar.

Now, after you adjust the size (by dragging the sizing handles of the graphics box) and position (by dragging the graphics box) of the graphic objects, you create the effect of a composite graphic image, as shown in Figure 32.2. You may have to resize, relocate, and reorder images several times to get just the effect you want.

Figure 32.2
You can size, position, and change the layer order of multiple graphics to create the effect of one image.

Grouping and Ungrouping Images

After you arrange the various images just the way you want them, it can be difficult to move or size the whole group without changing their relative positions and size. To make this easier, you can group the images so they act as one image. You can also easily ungroup the images should you wish to modify the grouping.

NOTE

> You can group any object created in the slide layer, including graphic images and text boxes. However, you cannot group layout or background objects.

To group two or more images, follow these steps:

1. Hold down the Ctrl key and select each of the images you wish to group. Presentations displays four sizing handles at the outermost edges of the selected group of objects.
2. Click the Group button, or right-click the group and choose Group from the QuickMenu.

The selected objects now appear as one group, and you can move, resize, rotate, or skew the group as a whole.

Another, perhaps quicker way to select a group of objects is to drag the mouse to select them. Follow these steps:

1. Position the mouse pointer at the farthest corner of an imaginary box that includes all of the objects.
2. Click and drag the mouse to the opposite corner of that same imaginary box (see Figure 32.3).
3. Release the mouse button. The four sizing handles that appear should encompass all of the objects.

Try moving the selected group. If they don't all move, you haven't selected all of the objects and you'll need to use Undo to reposition the images and start over again. Sometimes this method can be tricky because you must include the entirety of each object, and not include

any other objects that are not part of the group. If you have trouble, you can always use the Ctrl key and select each object individually.

Figure 32.3
You can select multiple objects by clicking and dragging a box around the object.

To ungroup the images, simply select the group and click the Separate button, or right-click the group and choose Separate Objects. The sizing handles seem to indicate that the group is still grouped, but click elsewhere on the screen and click an individual element to determine that indeed they have been ungrouped.

You have just discovered the secret to WordPerfect clip art images, which are nothing more than groups of drawings that combined appear to be one image. See "Editing WordPerfect Graphics in Presentations" later in this chapter for information on ungrouping and creating your own clip art images based on WordPerfect's clip art.

TIP FROM

Read Gilgen

You can make small groups of objects and then combine those groups with other groups as needed. Thus you can ungroup only those portions you want to modify, without risking changing those portions you want to keep intact.

USING IMAGES AND SLIDES CREATED IN POWERPOINT

Although Presentations is full-featured in and of itself, one has to recognize the preponderance of PowerPoint users and the slideshows they have already created. You can take advantage of PowerPoint materials by importing complete slides and modifying them or using objects they contain.

NOTE

These procedures assume you don't have the PowerPoint program. If you do, you can also open the slideshow in PowerPoint and simply copy objects from PowerPoint to Presentations.

To import a PowerPoint slideshow, follow these steps:

1. From within Presentations, choose File, Open. Presentations displays the Open File dialog box.
2. Click the File Type drop-down menu and choose MS PowerPoint (*.ppt).
3. Browse to the folder where the PowerPoint slideshow is located; then select and open it.

Presentations converts the PowerPoint slides to the Presentations format, thus creating a new Presentations slideshow. Note the following, however:

- In any conversion process, certain elements may not translate perfectly. Most basic slideshows convert well, but certain advanced elements do not, especially those not found in Presentations. You simply have to edit the imported slides to work within the Presentations environment.
- Imported slideshows bring with them their native PowerPoint design. Some designs do not convert cleanly, while others look just like PowerPoint.
- Only layouts found also in Presentations convert cleanly. Many PowerPoint layouts convert to a generic blank or title-only layout.
- Text box fonts and colors usually convert cleanly.
- PowerPoint clip art images and shapes often consist of a collection of ungrouped parts of the image. You need to select the objects (drag a box to surround the image's parts); then click the Group button, or right-click the object and choose Group.

If you want to use and modify the imported slideshow, do so as you would with any Presentations slideshow, recognizing that you are limited to Presentations features. Further, layouts, backgrounds, and so on are limited to what was imported. For example, if the imported slideshow did not contain any bulleted slides, a bullet layout will not be available for other slides you create or modify in that slideshow.

In many cases you may be better off creating a genuine Presentations slideshow, and adding objects to it that you copy from the PowerPoint slideshow. If you want to use only certain objects such as an image, or a text box, simply select them and paste them into your own Presentations slideshow.

See "Editing WordPerfect Graphics in Presentations" later in this chapter for information on modifying clip art in WordPerfect, most of which applies also to PowerPoint clip art imported into Presentations.

Adding Drawings by Using Presentations

Adding someone else's graphics may be fun and useful, but with the Corel's Presentations program, you have a powerful drawing program that you can use to add your own custom graphics and even modify graphics from other sources. For example, you can create a custom company logo, a graph using graphic images, or a simple clip art image extracted from a more complex image.

NOTE

The Draw Picture feature in WordPerfect is actually a window into the Corel Presentations program. When you choose Insert, Graphics, Draw Picture, or click the Draw Picture button on the toolbar, WordPerfect opens an editing window in the Drawing screens of Presentations.

If you start Presentations by itself, typically the PerfectExpert expects you to create a slideshow. However, you can also use it as a standalone drawing program, which is what you see when you access Presentations via WordPerfect.

Finally, if you access Presentations from the Windows Start Menu (All Programs), under WordPerfect Office X3 you can bypass the PerfectExpert and go directly to the Drawing screen by choosing Presentations Graphics X3.

If you're frustrated by the results you get as you experiment with the drawing tools, see "Using Undo" in the Troubleshooting section at the end of this chapter.

WORKING WITH SHAPES

If you're familiar with the processes for creating shapes in WordPerfect, you'll find that Presentations is similar, but with more options. In this section we'll explore using the Tool palette in Presentations.

USING LINE TOOLS

For those of us who can't draw a straight line, Presentations is a godsend. And if you want to draw a curved line, you can do that too.

To see the types of lines available, click the Line Shapes button on the Tool palette (see Figure 32.4). The Line Shapes button displays the last type of line you used. Basic line types include

Figure 32.4
A variety of line types are available on the Line Shapes button of the Tool palette.

- **Single segment lines**—You click at the beginning of the line and drag to the end of the line and release the mouse button. If you hold the Shift key down while dragging, Presentations constrains the line to horizontal, 45-degree, and vertical lines. Arrowhead lines start at the arrowhead and end at the tail.
- **Multiple segment lines**—Click at the beginning of the line and release the mouse button. Move the mouse pointer to the next turning point and click. Continue this until you reach the end of the line; then double-click. Hold the Shift key to make the segments perfectly horizontal, vertical, or at 45-degree angles.

- **Curved lines**—Curved and Bezier curve lines work like multisegment lines, except that as you change directions, the lines smooth into rounded turns instead of sharp angles. The Bezier curve tool gives you more control over the shape of the curves. Either tool is particularly good, for example, for drawing maps with curved roads.
- **Closed lines**—These types enable you to draw lines using the multi-segment line procedures, but when you double-click to end, Presentations automatically adds a line to close the last segment and fills the closed object.

USING CLOSED SHAPE TOOLS

Closed shapes come, as they say, in all shapes and sizes. You click and drag a shape to the size you want, using the Shift key to constrain the shape to exact proportions, for example, to a square or circle instead of a rectangle or oval. If you single-click, Presentations inserts a relatively small shape that you can modify, or delete and start over. Presentations shapes include the following:

- Basic shapes (see Figure 32.5).

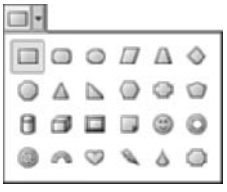


Figure 32.5
Basic shapes are not so basic, as seen on the Basic Shapes button of the Tool palette.

- Arrow shapes (see Figure 32.6).

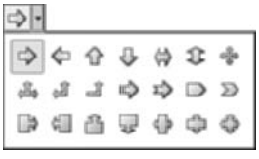


Figure 32.6
Arrow shapes are different from lines with arrowheads, as shown on the Arrow Shapes button of the Tool palette.

- Flowchart shapes (see Figure 32.7).

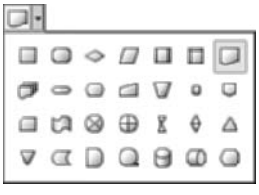


Figure 32.7
Choose from various flowchart shapes on the Tool palette.

- Star shapes (see Figure 32.8).

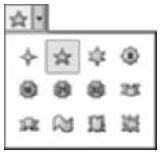


Figure 32.8
Several star shapes appear on the Star Shapes button of the Tool palette.

- Callout shapes (see Figure 32.9). Unlike WordPerfect's callout shapes, these do not automatically include a text box for the callout. Instead, you have to add a separate text box.

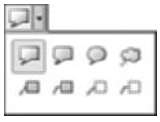


Figure 32.9
Callout shapes on the Callout Shapes button of the Tool palette do not automatically contain text boxes as they do in WordPerfect.

- Action Button shapes (see Figure 32.10). These will be useful as you begin to prepare a slideshow to be more navigable and interactive.

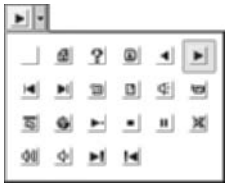


Figure 32.10
Action buttons on the Action Buttons button of the Tool palette are used with SpeedLinks to help with navigation of a slideshow.

Once created, you can manipulate shapes just like any other graphic object. Single-click the object to display its sizing handles; then drag the handles to alter the shape.

Many closed shapes also display a glyph (a small, pink, diamond shape) that when dragged changes the nature of the shape. Arrow bodies can be made thicker or thinner, smiley faces can change to frowns, and so on (see Figure 32.11).

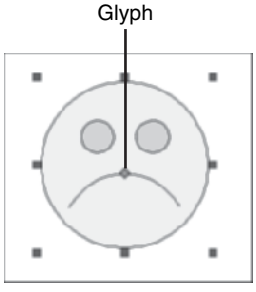


Figure 32.11
Use glyphs to modify many shapes.

➔ For information on how to create and manipulate various shapes, such as lines, closed objects, and callouts, **see** "Inserting Shapes," **p. 325**. [

➔ For information on how to add 3D and warp effects, **see** "Adding Special Effects to Text," **p. 790**.

➔ For more information on adding SpeedLinks to action buttons or other shapes, **see** "Working with SpeedLinks and SpeedKeys," **p. 875**.

Modifying Shapes Properties

If you're not enamored with the default aqua green of your Presentations shapes, you're in luck. Presentations gives you tons of options for modifying shape properties.

NOTE

> Modifying shape properties is an artistic endeavor that requires an aesthetic sense as well as a willingness to experiment. This outlines available options, and describes in detail a few of them. However, you should poke around the dialog boxes and try things out. You may be pleasantly surprised at what you find!

To access the Object Properties dialog box, simply right-click an object and choose Object Properties, or from the menu, choose Format, Object Properties, Fill. WordPerfect displays the Fill tab of the Object Properties dialog box (see Figure 32.12).

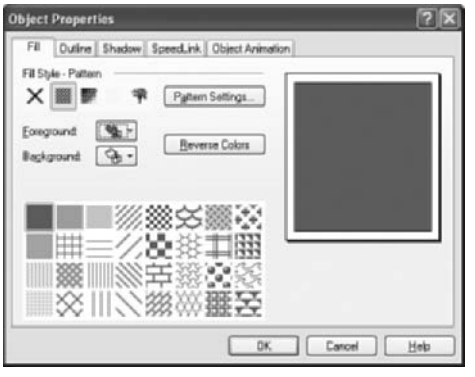


Figure 32.12
Add interest and variety to shapes with fill patterns.

Fill options include the following (see Figure 32.13):

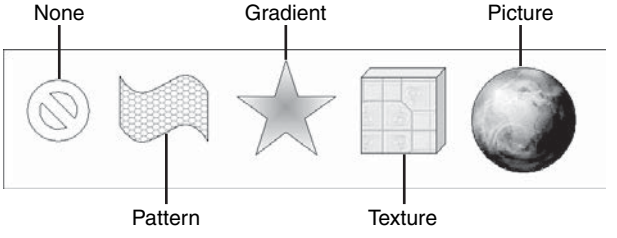


Figure 32.13
You can fill objects with a variety of patterns, textures, colors, or even pictures.

- **None**—The object displays only the outline of the shape, but otherwise the object is invisible.
- **Pattern**—This includes a single solid color, or two-color patterns. You can choose which colors you want.
- **Gradient**—This is one of those effects that can add a professional touch to your drawings. You can choose the style, the colors, and how and at what angles they blend.
- **Texture**—Stones, woods, fabrics, oils, and other designs can be chosen from the Category drop-down menu.
- **Picture**—Choose from among several picture categories, or a .bmp file of your own choosing.

The Fill Pattern button on the Tool palette gives you quick access to common and most recently used fill patterns. Click More on that button to access the Fill tab of the Object Properties dialog box. You can also access color options from the Tool palette.

Click the Outline tab of the Object Properties dialog box to display outline and other line styles (see Figure 32.14). Outline styles, such as line width, style, and color apply to both closed shapes and lines, and can also be accessed from the Tool palette. Joints and caps (such as arrowhead styles) apply only to open lines.

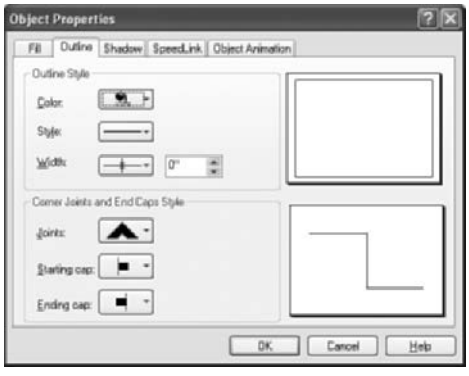
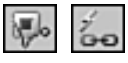


Figure 32.14
From the Object Properties dialog box, you can modify joints and ends of lines.

Click the Shadow tab of the Object Properties dialog box to display object shadow options (see Figure 32.15). Choose the offset from a palette of predefined shadows, or customize the shadow by using the slide bars or counter boxes. You can also specify the shadow's color, and whether it is transparent (allows what's behind it to show through) or not.



The other two tabs, SpeedLink and Object Animation, are described in another chapter.

➔ For more information on SpeedLinks or Object Animation with shapes, **see** "Preparing a Slideshow," **p. 870**.

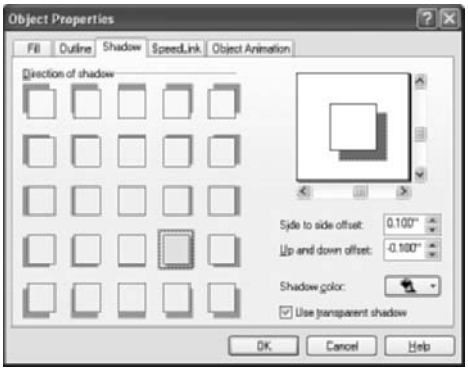


Figure 32.15
Shadows can help make objects stand out on the slide.

Editing WordPerfect Graphics in Presentations

WordPerfect ships with a collection of some 10,000 clip art images. Not enough, you say? Using Presentations, you can pull apart, modify, combine, or customize many of those clip art images to create just the image you need. Likewise, you can modify clip art images from some other programs, including PowerPoint.

➔ For information on using WordPerfect's clip art images, **see** "Inserting Graphic Images," **p. 308**.

All this is possible in part because WordPerfect graphics are vector graphics. This means that clip art images are actually a combination of many images, each of which can be separated from the original clip art and modified.

NOTE

> WordPerfect graphics are vector graphics because they are created by drawing lines between reference points, or vectors. If you move the vectors, the entire line changes. Other programs, notably paintbrush-type programs, create bitmap graphics by filling in areas with dots, or bits.

Modifying clip art images is an artistic endeavor, determined by your needs and by what you think looks good. Nevertheless, the basic procedures are the same no matter what you want to modify. For example, suppose you want to add a chalkboard background with a custom message. You look through the clip art list and notice a chalkboard that just might do the trick; however, you don't want what's written on the chalkboard, and the chalk stick is in the wrong place. Furthermore, you're not sure that you want the chalkboard rotated.

To modify a WordPerfect clip art image in Presentations, follow these steps (but don't be afraid to experiment along the way!):

1. Add the clip art image onto your slide (for example, the chalkboard from the Scrapbook, Toys category, using the WordPerfect Office X3 Graphics CD).
2. Double-click the image to open an editing window.

3. Click a part of the image you want to get rid of. If the sizing handles seem to indicate a larger selection than you anticipated, double-click the image again to begin separating the parts of the image. Eventually, you see sizing handles around that part of the image you want to work with—for example, a piece of the text (see Figure 32.16).

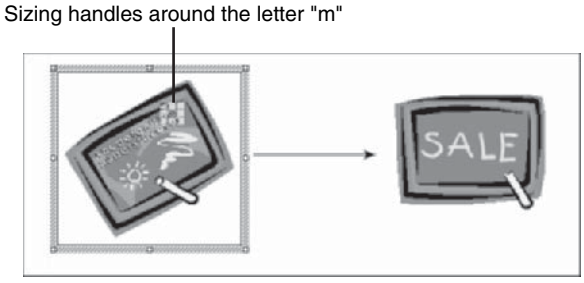


Figure 32.16
You know which part of an image you are deleting by the location of the sizing handles.

NOTE

> Double-clicking a combined image temporarily separates the parts of the objects that make up that image. You could also choose Edit, Arrange, Separate Objects, but that requires that you group the objects you want to keep later.

4. If there are many small objects you want to remove as a group, you can select several at a time by dragging the mouse to create a box that surrounds the multiple objects. For example, if you attempt to move the chalk stick and find that it's composed of two objects, you can use this step to select the whole chalk stick image and move it at once. You have to start where no object exists, so this can be tricky. Also, check to make sure you don't leave objects, or delete ones you want to keep. Use Undo and start over if you do.
5. You can make changes to any object or group of objects. Some changes you might make include the following:
   - **Delete an object**—For example, if you want to remove the text on the chalkboard, select it and press Delete.
   - **Change colors**—For example, you could change the chalk stick from white to yellow.
   - **Change a shape**—You can drag the sizing handles to skew or change the size of the object; for example, you could rotate the entire image.
   - **Add other objects**—For example, you could add a text line to the chalkboard. You can even add other clip art images to the image.
6. When you finish modifying the clip art image (refer to Figure 32.16, which shows the modified clip art image), click outside the edit window to return to your slide.

As you work with clip art images using Presentations (or Draw, in WordPerfect), you begin to understand how clip art designers do their work, which makes it easier for you to create your own images. You also discover certain limitations to editing existing clip art.

For example, clip art designers often use layers of solid colors as backgrounds to an entire image. When you remove the background from one part of an image, unfortunately you also remove it from other parts. Figure 32.17 shows how removing a solid black background can adversely affect an image. You want to keep the face, but not the neck on down, of the doctor clip art.

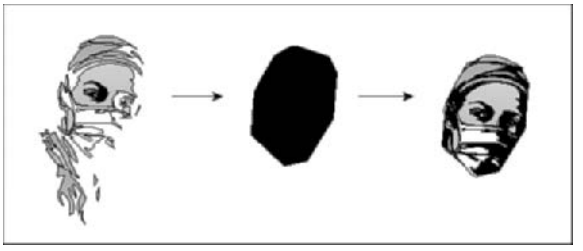


Figure 32.17
Clip art images are composed of layers. Removing a layer may remove more from an image than you expect. You can add a new background layer to the area you do keep.

To remedy this sort of problem, you sometimes can add solid objects that cover just the part of the object you want to keep and then send that object to the back, or bottom layer. The black object then shows through again as lines on the image (refer to Figure 32.17).

EDITING BITMAP GRAPHICS IN PRESENTATIONS

You've searched high and low, and the very best graphic image you can find is a bitmap image from the Internet. But you still need to make a couple of minor changes. Fortunately, Presentations also includes a Bitmap Editor, which you can also use from within WordPerfect.

NOTE

Bitmap images, created in paintbrush-type programs, are drawn by filling in areas with dots, or bits. Bitmaps are more difficult to modify because many bits must be changed. For example, just to change a line you must erase the bits of the old line, and draw all the bits of the new line.

What do you do if features suddenly stop working? See "When Features Stop Working" in the Troubleshooting section at the end of this chapter.

To edit a bitmap image, follow these steps:

1. Insert the image into your slide. Typically, you choose Insert, Graphics, From File. You then browse to find the file and click Insert.
2. Double-click the image to open it in the Bitmap Editor (see Figure 32.18).

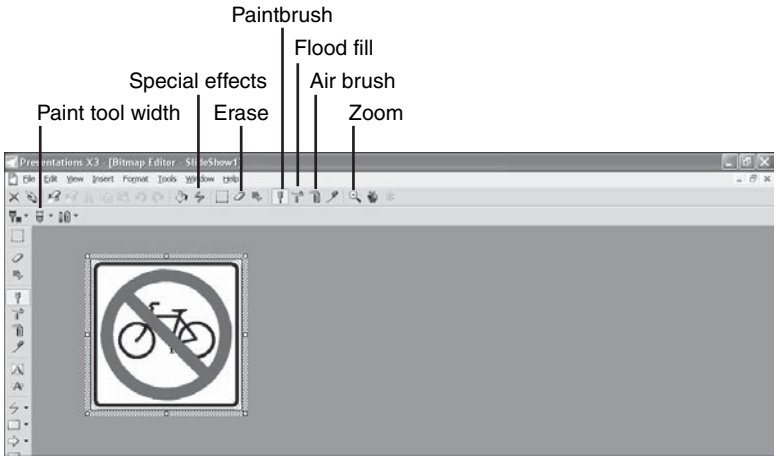


Figure 32.18
The Bitmap Editor is a paintbrush-type program within the Presentations program.

3. You have a whole new set of tools available, including the paintbrush, flood fill, and air brush. Some of the ways you can modify the image include the following:

- **Erase**—Use the eraser to remove parts of the bitmap image you don't want.

- **Zoom**—Choose View, Zoom to zoom in on the bits, thus making it easier to modify bit by bit (see Figure 32.19).

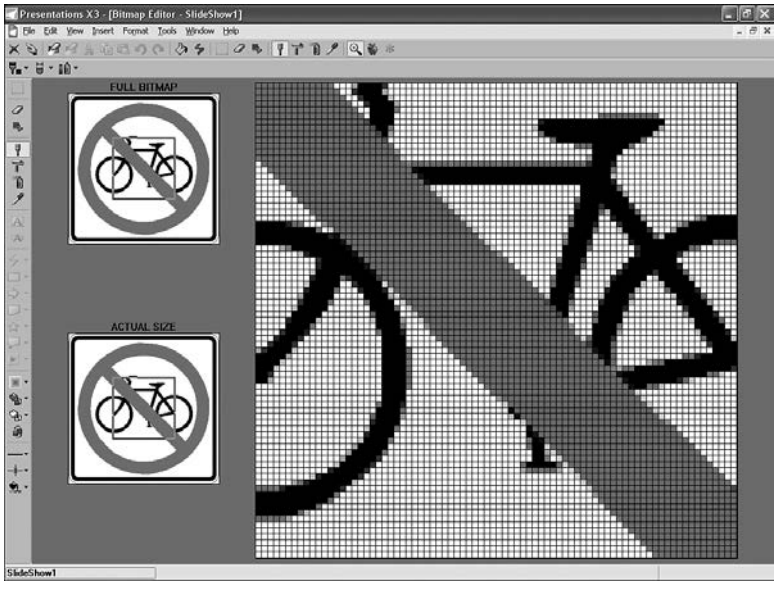


Figure 32.19
You can use Zoom in the Bitmap Editor to get in close to the individual picture bits.

- **Paintbrush**—The paintbrush enables you to draw, freehand, in different colors and with different brush widths. You can use smaller brush widths for more detailed changes.

- **Flood Fill**—Choose a color, and then click this tool in an area of color to replace that color with the new color. This requires a closed area to work; otherwise, the paint floods into other areas.

- **Air Brush**—Using this tool is like using a can of spray paint. Try it!

- **Effects**—Click this button to open the Special Effects dialog box that enables you to blur, soften, sharpen, emboss, or add other special effects to the bitmap image.

NOTE

You can, and very well may, spend hours editing bitmap images. You'll discover almost immediately how difficult it is to make precise changes to an image. Just remember that you really don't have a choice if you want to edit a bitmap image, but that you do have special effects tools at your disposal to do things you can't do with vector graphics. Also, don't forget to use the Undo button immediately when you make mistakes, because the Bitmap Editor allows only one level of Undo.

Have you messed up the graphic image beyond hope? See "Aborting Bitmap Editing" in the Troubleshooting section at the end of this chapter.

4. When you're done, click the Close button on the toolbar to return to your Presentations slide or drawing screen (see Figure 32.20). On the other hand, if you've made a terrible mess of things, and would prefer to start over, click the Cancel Bitmap button on the toolbar to close the Bitmap Editor without saving the changes you made.

CAUTION

If you opened the Bitmap Editor from WordPerfect in a regular Draw screen, choosing File, Close causes WordPerfect to close the entire WordPerfect document.

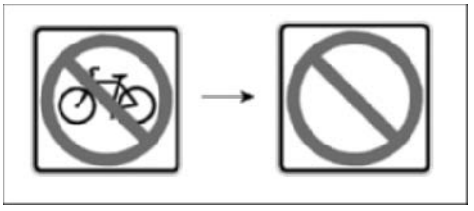


Figure 32.20
Even bitmap images can be modified with the Bitmap Editor to fit your needs.

Finally, if you do want to edit a clip art image with the Bitmap Editor, you can select the object and choose Tools, Convert to Bitmap. The vector image becomes a bitmap image.

WORKING WITH SLIDE PRESENTATIONS VERSUS DRAWINGS

When you first open Presentations, you have the option of creating a Presentations Slideshow or a Presentations Drawing. Throughout these chapters on Presentations, we work in the Slide Presentation mode. However, most of the features relating to objects you add to the slide layer also work in the Drawing mode.

The Drawing mode is designed to create single page documents, such as posters or banners, or for creating images that can be saved for later use as clip art.

The Drawing mode screen is essentially the same as the Slide Presentation screen, except that the slide properties buttons are not available. Instead, Presentations displays buttons to set grids and rulers, and a button for scanning (see Figure 32.21).

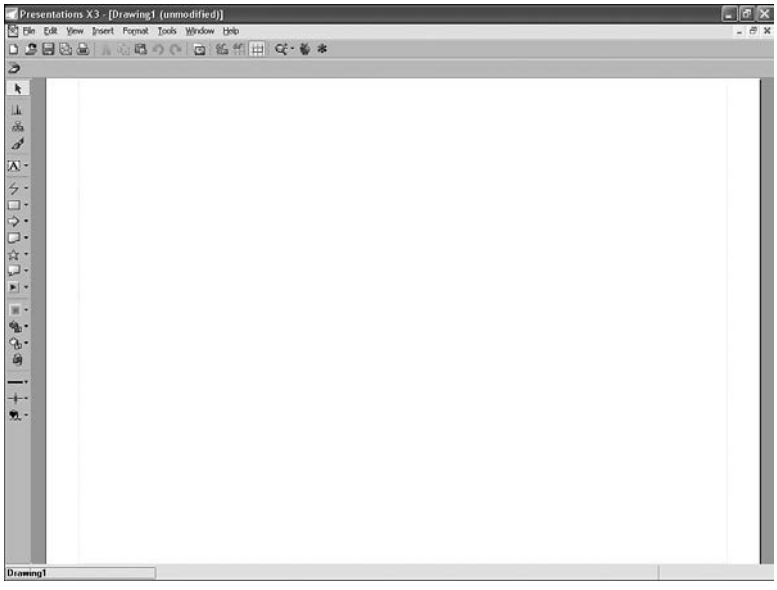


Figure 32.21
The Drawing screen is devoid of buttons related to slides, but adds buttons for grids and scanning.

One feature that is unique to the Drawing program is the Poster feature, whereby you can print a drawing over several pages.

To create a multipage poster, follow these steps:

1. Select File, Page Setup to display the Page Setup dialog box.
2. Click the Poster tab to access the Poster feature (see Figure 32.22, which shows a poster layout already selected).

Figure 32.22
Select a grid of landscape or portrait pages to create multi-page posters.

3. Click the Poster Size button and specify how many sheets wide and how many sheets tall the poster should be.
4. Click OK to return to the Drawing screen.
5. Add text and graphic images to fit within the poster layout you chose (see Figure 32.23).

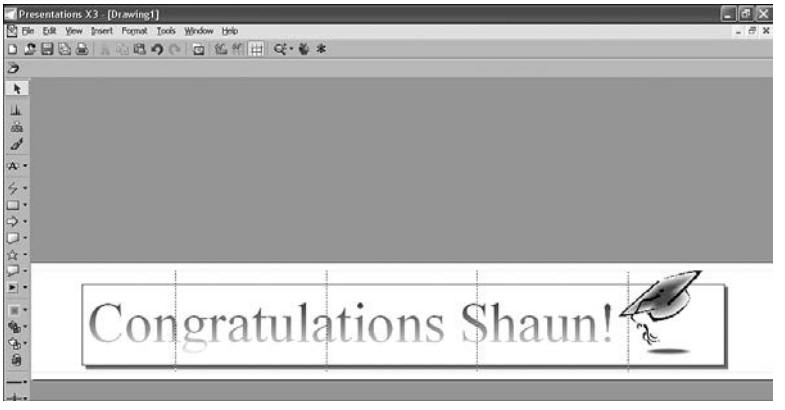


Figure 32.23
Posters are a breeze using Presentations's Poster feature.

When you print the poster, your printer places part of the drawing on each sheet and leaves enough space for you to trim and overlay sheets by gluing them into one continuous poster.

When you save a slideshow, Presentations adds .shw to the name. When you save a drawing, Presentations adds .wpg to the name (WordPerfect Graphic).

In either mode, you can also select an object such as a graphic image and save just that object. Further, you can save it as a WordPerfect graphic image (.wpg), or choose to save it in one of a variety of formats, include bitmap formats such as .jpg or .gif that you can use on Web pages.

To save an object from within Presentations, follow these steps:

1. Select the object or group of objects.
2. Choose File, Save As. Presentations asks if you want to save the whole file, or just the selected items. By default, it saves only the selected objects.
3. Click OK to display the Save As dialog box.
4. Click the File Type drop-down menu to display and select an available graphic format type. For example, CompuServe Bitmap is the .gif format, and Joint Photographic Experts Group is the .jpg format. Presentations's native format is WordPerfect Graphics.
5. Provide a name for the image and click Save.

If you are converting to a bitmap image, Presentations asks you to further define the image, as shown in Figure 32.24. Generally, the default settings are adequate, although you can change the size, resolution, color depth, and so on.

Figure 32.24
You can save graphic images created in Presentations to bitmap formats, such as .jpg and .gif images.

NOTE

> Saving specific images to a bitmap format often sounds better than it really is. The result sometimes isn't very crisp. Nevertheless, this feature does allow you to create images for Web-based applications that you might otherwise not be able to.

ADDING SOUNDS

If a picture's worth a thousand words, just imagine what sounds can be worth! Whether you want background music or sound clips of speeches, language examples, or sound effects, Presentations makes it easy to add sounds to a slide.

TIP FROM

Read Gilgen

If you've ever had to wrestle with a bunch of different pieces of AV equipment, such as a boom box, TV, and computer, just to get the media you need for a presentation, consider instead digitizing the audio and video clips you need and inserting them into Presentations. Presentations thus becomes a multimedia manager, making it much easier to play just the right clips exactly when you need them.

INSERTING SLIDESHOW BACKGROUND SOUNDS

By default, inserting a sound in Presentations means that the sound is a background sound to a slide, or series of slides. This can be useful to set the mood, or for an unattended, self-running show at a vendor booth.

To insert background sound, follow these steps:

1. Go to the slide where you want the sound to begin.

TIP FROM

Read Gilgen

If you want to start the background sound as you begin your presentation, you can make two copies of your opening title slide: one to display without sound while the audience arrives, and a second one to display with sound when you're ready to begin.

2. Choose Insert, Sound. Presentations displays the Sound tab of the Slide Properties dialog box (see Figure 32.25).

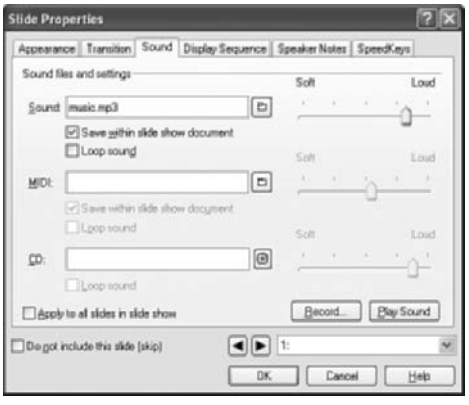


Figure 32.25
You can insert background sounds in a Presentations slideshow by using the Sound tab of the Slide Properties dialog box.

3. Click the folder button next to the Sound text box to browse for digital sound files, including .wav (Windows Audio File), .mp3 (a common sound file standard), and .wma (a more recent Windows media format). After you find the file you want, click Open to return to the Slide Properties dialog box.

4. Choose additional options for the sound file, including
   - **Save Within Slide Show Document**—This is the easiest way to make sure the sound file stays with your slideshow. If the file is very large, you may not want to include it in the slideshow, but then you have to be careful that the file is exactly where Presentations expects it to be—the path indicated in the Sound text box.
   - **Loop Sound**—This means the sound will repeat continuously until the end of the slideshow, or until you play another sound.
   - **Soft/Loud**—Use the slider to set the volume of this sound clip. You can click the Play Sound button to preview the sound, and adjust the volume at the same time.
5. Click OK to insert the sound as part of the current slide.

When you play the slideshow, and arrive at this slide, Presentations automatically plays the sound you added.

If you can't seem to play the sounds you thought you inserted, see "Where Are My Media Clips?" in the Troubleshooting section at the end of this chapter.

You also have the following options for inserting sounds as a slide background:

- **Record**—This option opens the Windows Sound Recorder which enables you to record if you have a microphone installed. This does not automatically insert the recording; you have to save your recording and then insert it as you do other sound clips.

TIP FROM

If you plan to do lots of microphone recordings, or if you need recordings that last longer than 60 seconds (the limit in Windows Sound Recorder), you may want to use a different recording program such as Audacity, a free full-featured utility from http://audacity.sourceforge.net for recording and editing sound files.

- **MIDI**—The MIDI sound format is typically synthesized music, usually quite small in file size but also quite artificial sounding. Presentations ships with several MIDI sound files.
- **CD**—Click the CD icon to display the Slide CD-Audio dialog box (see Figure 32.26). Here you can select the CD track, and how much of the track you want to play. You can even click Play and then click Mark for the beginning or ending spots. Using this option does require, of course, that the CD itself be in the CD drive when you play the slideshow.

TIP FROM

If you don't want to depend on having your music on a CD, you can "rip" (copy to your hard drive) a CD track in MP3 or WAV file format and insert the resulting file into your slideshow as a sound clip.

Figure 32.26
Presentations enables you to easily select just the exact part of a CD audio track you need.

Note that you can play all three types of sounds at the same time. Mixing music tracks might not be terribly useful, but you could play a music CD background with a recorded narration, setting the volume for each to get just the right balance.

CAUTION

It may seem obvious, but in order to play sounds in a Presentations slideshow, your computer must have the necessary hardware and software. Most newer computers are fully multimedia capable. However, if you're going to present to a large group, make sure you have speakers or a sound system that can be heard. Further, if you're going to use someone else's computer, make sure it can play your media clips before you get in front of your audience.

INSERTING SOUND OBJECTS

Background sounds serve a purpose, but you can also insert smaller sound clips to play only when you want them to. For example, you might display an image of Martin Luther King, and at the appropriate moment, play a clip from his "I Have a Dream" speech. Or you could display a written selection from that speech and then play the recorded clip of that selection.

You can launch sound clips in two very different ways: using SpeedLinks or using SpeedKeys.

➔ For more information on adding using Presentations's SpeedLinks and SpeedKeys, **see** "Preparing a Slideshow," **p. 870**.

USING SPEEDLINKS TO PLAY SOUNDS

To use a SpeedLink, you first have to create an object that you'll click to activate the sound. Such an object might be a photographic or clip art image, a drawing shape such as an action button, or even a text box. To create a SpeedLink, follow these steps:

1. Create or select the object that you want to link to. For example, from the Action Shapes button on the Tool palette, select and draw a Sound action button.

2. Right-click the selected object, and choose SpeedLink. Presentations opens the SpeedLink tab of the Object Properties dialog box (see Figure 32.27).

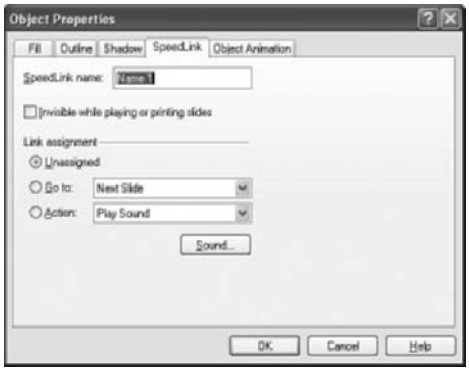


Figure 32.27
SpeedLinks link certain actions to objects on the screen.

3. Click the Action radio button, and choose the Play Sound option from the drop-down menu.
4. Click the Sound button to display the Sound dialog box (see Figure 32.28). The options shown here are nearly identical to those used for inserting sounds in the Slide Properties dialog box (refer to Figure 32.25).

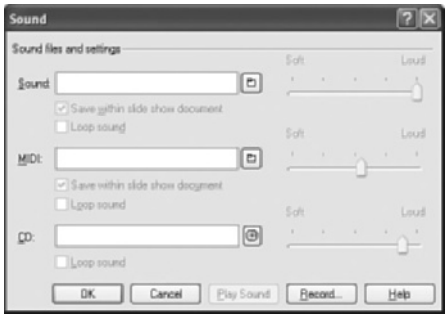


Figure 32.28
Options for playing SpeedLinked sounds are similar to those used for background sounds.

5. Browse to the Sound, MIDI, or CD file you want to use; choose options such as volume; and click OK to return to the Object Properties dialog box.
6. Type a SpeedLink name if you want.
7. If you don't want the linked object to appear when playing the slideshow, or on your printed slides, select Invisible While Playing or Printing Slides.
8. Click OK again to return to your slideshow.

Now, when you play the slideshow, you simply click the SpeedLinked object to play the sound.

USING SPEEDKEYS TO PLAY SOUNDS

Another nifty way to activate sound clips while playing a slide is to link a sound to a key using Presentations's SpeedKey option.

To link a sound to a keyboard key, follow these steps:

1. Choose Format, Slide Properties, SpeedKeys. Presentations displays the SpeedKeys tab of the Slide Properties dialog box (see Figure 32.29).

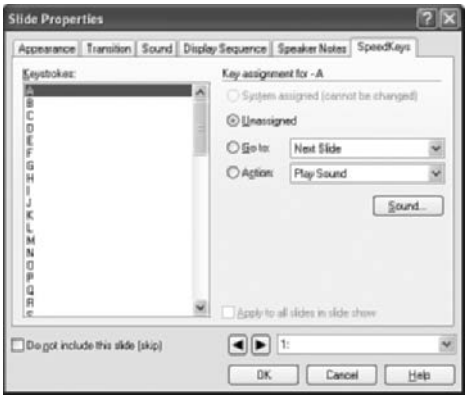


Figure 32.29
SpeedKeys enable you to assign a keystroke to a specific action.

2. Click the key to which you want to assign the sound. Try to use something that you can remember, such as "S" for "speech" or "M" for "Music."

NOTE

> As of this writing, a bug in Presentations prevents you from attaching SpeedKeys to numbers. If this is fixed, numbers will work just like letters for assigning SpeedKeys.

3. Click the Action radio button, and choose Play Sound from the drop-down menu.
4. Click the Sound button and Presentations displays the Sound dialog box (refer to Figure 32.28).
5. Choose a sound and playback options and click OK.
6. In the Slide Properties dialog box, you can choose Apply to All Slides in the Show, which means that this SpeedKey assignment works for all slides. Otherwise, this SpeedKey works only on the current slide.

Now as you play your slideshow, when you're ready for that special sound clip, just press the assigned SpeedKey letter.

ADDING MOVIES

Using video images in slideshows used to be a daunting proposition. After finding the right video clip, you then had to digitize it. Although you still may need to digitize existing video material, it's also a relatively simple process to record video segments with digital cameras or camcorders and save them in digital formats.

NOTE

> The process for creating digital video is beyond the scope of this book, but using digital video in a Presentations slideshow is easy and useful.

To add a video clip to a Presentations slide, follow these steps:

1. Go to the slide where you want to insert the video clip.
2. Choose Insert, Movie. Presentations displays the Insert Movie dialog box (see Figure 32.30).

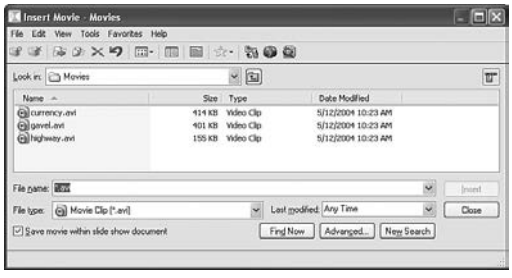


Figure 32.30
Inserting movies is easy using the Insert Movie dialog box.

3. Browse to find the video clip. Such files usually have the .mpg or .avi extension. QuickTime movies (.mov or .qt) may or may not work, depending on how they were created.
4. Click insert to add the movie to your slide.

You now can size or move the movie where you want it. You can also arrange it with other objects, such as text boxes or shapes, for example, as shown in Figure 32.31.

Unlike inserted sounds that only play in the background, inserted movies act more like linked sound clips that play when you want them to. When you play the slide, simply click the movie to start playing it. Click it again to pause or restart. You can even play two or more movies at the same time.

You can also change the way a movie clip plays. Select an inserted movie clip and choose Format, Movie Properties to display the Movie Properties dialog box (see Figure 32.32). Some of the options are obvious, such as saving the movie in the slideshow or continuously playing it. By default, movies display a small control panel to pause, restart, rewind or fast

forward the clip. Presentations also includes the video clip in the slideshow which makes it easy to know where it is, especially if you transfer the slideshow to another computer. Also by default, movies only play when you click them.

Figure 32.31
You can arrange movie clips and other slide elements for effective multimedia presentations.

Figure 32.32
You can control how a movie clip appears and is played in a Presentations slide using the Movie Properties dialog box.

If you don't want the audience distracted by the first frame of the movie clip, you can choose the Hide Movie While Playing option. However, you must know where the clip is located to be able to click and play it.

One way to use this option to your advantage is to create a smaller image, such as a video action button, and place it within the area of the video clip. When you play the slideshow, you appear to click the action button, but you actually click the invisible clip and play it.

INSERTING MEDIA OBJECTS

Another method for inserting media objects is to choose Insert, Object, Create from File, and then select the media file to be inserted.

This method depends upon OLE (Object Linking and Embedding) described in Chapter 13, "Importing Data and Working with Other Programs." However, this method is more complicated than the methods already described and it offers virtually no additional benefits.

➔ For more information on using OLE to link objects, **see** "Using OLE Linking and Embedding Options," **p. 346**.

TROUBLESHOOTING

USING UNDO

It seems like nothing I do turns out right. Pretty soon my graphic is a complete mess. Is there anything I can do besides delete it?

Even artists have rags to wipe up their messes. Although it may seem absurdly elementary to mention this, you really must think Undo whenever you try something that you don't like. You should use Undo immediately because if you wait, you may not be able to restore whatever you messed up, especially in the Bitmap Editor where you have only one level of Undo.

HOW TO GET OUT OF THE DRAW SCREEN

When I edit an image in WordPerfect and choose File, Close, WordPerfect closes my entire document. I want to close just the Draw Editor.

If you click the Close button on the toolbar, WordPerfect closes just the editor. In either WordPerfect or Presentations, the easiest way to exit the Drawing Editor is to click outside of the editing box. You then close the editor and return to your original application.

WHEN FEATURES STOP WORKING

Sometimes when working with graphics, certain features suddenly stop working or disappear from the toolbar. What's wrong and how can I fix it?

Sometimes, especially when working with memory-intensive features such as graphics, features that you've used before suddenly don't work. This is Presentations's quirky way of telling you it's getting forgetful. Often the only way to remedy this situation is to exit Presentations altogether, and even sometimes to reboot your computer, before starting Presentations again. Doing this usually causes the features to magically start working again. This generally is not a problem with more modern computers with 512MB of RAM or higher.

Aborting Bitmap Editing

I've messed up my bitmap editing so badly, and it seems I can only undo one action. I don't want to save the whole mess by returning to the Slide Editor. What can I do?

Fortunately, you can abort a bitmap editing session by clicking the Cancel Bitmap button on the Bitmap toolbar. This returns you to the Slide Editor or drawing screen without keeping any changes you may have made. In Presentations itself, you have multiple levels of Undo, but you don't in the Bitmap Editor.

Where Are My Media Clips?

I'm sure I inserted a sound clip (video clip) in my slideshow, but when I play the show the sound won't play. What happened?

If you didn't choose to save the clip as part of the slideshow, Presentations wants to look to the location where the file was originally found, for example, in your My Documents folder. If you have moved the file, or if you moved your slideshow to another computer without also copying the media file to that exact path, Presentations won't be able to play it. Always check your media files before you go before your audience.

CHAPTER 33

Working with Data and Organization Charts in Presentations

In this chapter

by Read Gilgen

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CREATING DATA CHARTS

WordPerfect communicates words effectively, and WordPerfect tables present numbers well. Quattro Pro handles formulas and calculations with ease. But numbers and words are often more effective when accompanied by charts that present information graphically.

Presentations's data chart feature can convert otherwise boring or unintelligible figures into bar charts, pie charts, and more. You can even link charts to tables of data or to spreadsheets. You can use the resulting data charts in your slideshows, in drawings, in WordPerfect, or in Quattro Pro.

NOTE

> Quattro Pro's data chart procedures differ quite a bit from those found in Presentations, which is the same as WordPerfect's Draw program. You can create charts in either program, depending on which you're most comfortable with, and copy the charts to other WordPerfect Office programs.

To create a chart in Presentations, choose Insert, Data Chart. Presentations opens a chart editing window and a datasheet filled with sample data, along with the editing tools from the Presentations chart program (see Figure 33.1). A datasheet is a small spreadsheet.

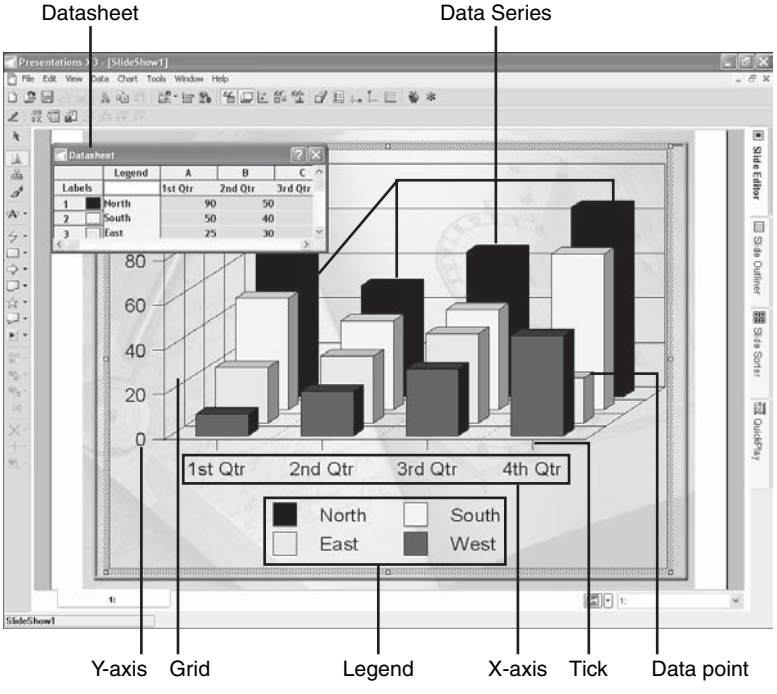


Figure 33.1
When you create a chart, Presentations first displays a bar chart, complete with sample data.

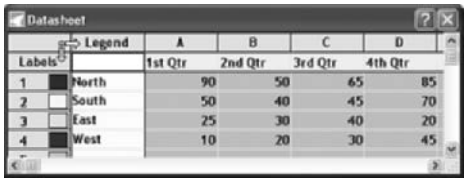
ENTERING DATA IN DATASHEETS

The foundation for any chart is a series of numbers, and labels to identify those numbers (refer to the datasheet in Figure 33.1). If you create such numbers in a spreadsheet, you can import them into a Presentations chart. You can also create the numbers in a WordPerfect table, and create a chart based on the table data. Finally, you can enter the numbers directly in the chart's datasheet.

If you use the datasheet for chart numbers, consider the following (see Figure 33.2):

- You can drag and size the datasheet to display a larger spreadsheet-like area.
- The legend identifies rows, or series of data—for example, the figures for the North, South, East, or West regions.
- Each series (that is, row) is represented by a color, along with the legend name.
- The labels refer to columns of data—for example, 1st Quarter, 2nd Quarter, and so on.
- Labels appear horizontally along the X-axis of the chart.
- The values of labels (sometimes broken down by series) are matched with numbers that appear vertically along the Y-axis of the chart.

Figure 33.2
You can use the datasheet to prepare the underlying data for a chart.



Datasheet

Legend	A	B	C	D
Labels	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
1 North	90	50	65	85
2 South	50	40	45	70
3 East	25	30	40	20
4 West	10	20	30	45

You edit labels and data the same way you do in a Quattro Pro spreadsheet. For example, you can click a cell and type replacement data. You can also select entire rows or columns by clicking the row or column indicator, and you can drag, size, copy, or delete the selected data. As you enter each number, WordPerfect automatically updates the chart to reflect the new number.

If you want to start from scratch, choose Edit, Clear All, and then click Yes when asked whether you want to clear all the data. You can also click the upper-left cell (refer to Figure 33.2, where the pointer displays both the row and column select arrows), and then press Delete. When prompted, you can choose to clear Data (the default), Format, or Both. Click OK to clear the data.

The Chart Editor also enables you to use several menu options, along with corresponding toolbar buttons to assist in editing the datasheet. Choose Data to access the following options:

- **Format**—You can change the numeric formatting of selected cells (for example, to display currency or percent). These changes appear in the chart only if you use data labels.
- **Column Width**—You can change the width of columns in the datasheet.

- **Formulas**—You can create formulas in the datasheet by using the Row/Column Formulas dialog box, but you do not have nearly the power nor flexibility you have in a spreadsheet or even in a WordPerfect table. If you plan to use complex formulas, you should create the data in a spreadsheet or table, and then import the data (see the section "Importing Data into Datasheets," later in this chapter).

- **Recalculate**—If you use formulas in the datasheet, and later change the data, you should recalculate the datasheet to make sure you have the correct results.

- **Sort**—Select an area of data and sort it top to bottom, or left to right, in ascending or descending order.

CAUTION

> You sort only that which you've selected. If you select only the legend text, for example, you sort only the text but not the data on the rows represented by the legend. You then have data that does not match the legends or labels.
>
> To sort entire rows, including the legends and the data, click on the row indicators, and drag to select all the rows you want to sort. To sort entire columns, including data labels, click the column indicators and click and drag to select the columns you want.

If you sort your data incorrectly, but now can't get the original, correct data back, see "Saving It Anytime" in the Troubleshooting section at the end of this chapter.

- **Exclude Row/Column**—If you don't want a certain row or column to appear in the chart, select the row or column and click this button. WordPerfect also partially hides the data in the datasheet (the numbers and text appear in light gray).

- **Include Row/Column**—If you want to use a row or column that you've excluded, select that row or column and click this option. The data also reappears in the datasheet.

- **Range Highlighter**—This option, on the View menu, lets you change the background colors in the rows and columns of the datasheet. It does not change the colors used to represent data in the chart itself.

To return to Presentations, click outside the chart editing box. The datasheet and chart tools disappear, leaving the data chart in a graphics box.

To edit the data chart, double-click it to return to the Chart Editor.

If the chart doesn't look as good as it did while you were editing it, see "Don't Worry, Just Print It" in the Troubleshooting section at the end of this chapter.

IMPORTING DATA INTO DATASHEETS

Often the data you need for a chart already exists in a spreadsheet. You can import that data or link it to the chart. To import data from a spreadsheet, follow these steps:

1. Choose Data, Import, or click the Import button on the toolbar. Presentations displays the Import Data dialog box (see Figure 33.3).

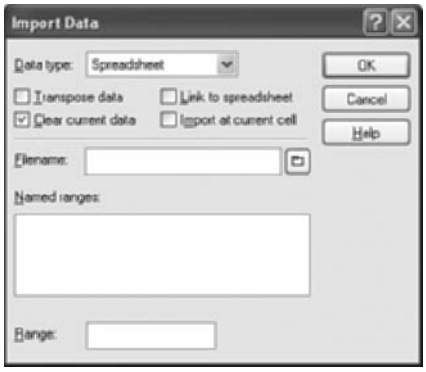


Figure 33.3
You can use the Import Data dialog box to import chart information from a spreadsheet.

2. Choose the Data Type. Typically, you import data from a spreadsheet, but you can also import numbers from ASCII or ANSI delimited text.
3. Specify a filename. If you browse for a file, by default WordPerfect searches for Quattro Pro spreadsheets. You can, however, import from Lotus, PlanPerfect, or Excel, or from spreadsheet programs that can save data in those formats.
4. Select a range from the Named Ranges box. You can also type a specific range in the Range box, for example A3..D7.

TIP FROM

Read Gilgen

If you prepare a spreadsheet that is to be used in a Presentations or WordPerfect chart, it helps to name ranges, or small sections of the spreadsheet, to facilitate importing it into a chart or table.

5. Choose from the following options:
   - **Transpose Data**—Typically, the heads of columns in a spreadsheet become the labels (the X-axis). To make the rows of a spreadsheet the X-axis, you transpose the data (that is, rows become columns, and columns become rows).
   - **Clear Current Data**—You can merge spreadsheet data with what's already in the datasheet, but typically, you need to clear the data first.
   - **Link to Spreadsheet**—Choose this option to link the spreadsheet and the chart so that the chart can be updated to reflect changes in the spreadsheet.
   - **Import at Current Cell**—Unless you choose this option, WordPerfect imports the spreadsheet data to the upper-left cell of the datasheet.

CAUTION

Be sure to include the row and column headings in the range you import from the spreadsheet. Otherwise, spreadsheet numbers appear in place of labels and legends. If you don't have text labels in the spreadsheet, you can avoid this problem by positioning the cursor in cell A1 of the datasheet and using the Import at Current Cell option. You then must add the legend and labels by hand.

TIP FROM

Read Gilgen

When you import data from a spreadsheet, it often includes rows or columns that you really don't want to include in the chart. In the datasheet, select those rows or columns and choose Data, Exclude to hide them and to exclude them from the chart.

CREATING A CHART IN WORDPERFECT BASED ON A TABLE

If you've come to Presentations from WordPerfect, you can create a data chart using information you create in a WordPerfect table. This way, not only do you present the graphic illustration of the data, but you also present the data itself in case the reader wants to examine it more closely (see Figure 33.4). An added benefit is that the chart is automatically linked to the table, and changes you make to the table update quickly and easily in the data chart.

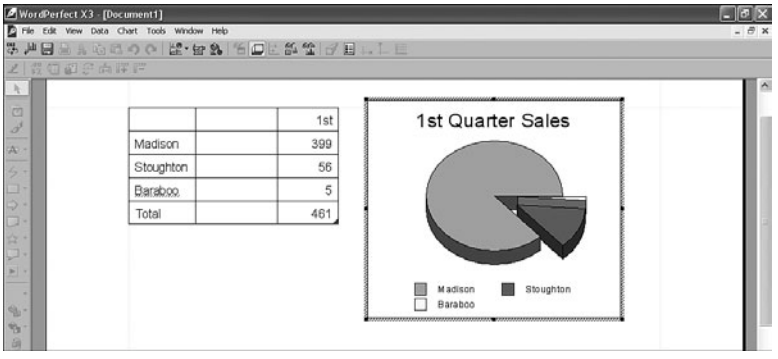


Figure 33.4
If you base a chart on a WordPerfect table, the reader can refer to both in the document.

To create a data chart based on a WordPerfect table, follow these steps:

1. Create the table first. Make sure it includes the numeric information you want, and also text labels (column headings) and legend/series (row headings).
2. If you intend to include the entire table in the chart, go to the next step. Otherwise, select those cells you want to include, being sure to include labels.
3. Choose Insert, Chart.

WordPerfect opens the chart editing window and a chart that uses the table data (refer to Figure 33.4). No datasheet is necessary because the table serves that purpose.

To update a chart based on changes you make to its table, click the table, and choose Table, Calculate. WordPerfect recalculates any table formulas that need to be updated, and also updates the chart with the new data.

➔ If you're not familiar with WordPerfect's table math capabilities and want to learn how to use this powerful feature, **see** "Using Spreadsheet Formulas in Tables," **p. 366**.

CHOOSING CHART TYPES

The type of data you use and how you want to present it determine what kind of chart you use. By default, Presentations opens a three-dimensional bar chart. To see the wide variety of chart types available after opening a chart-editing window, choose Chart, Gallery. Presentations displays the Data Chart Gallery dialog box (see Figure 33.5), where you can choose from among 11 types of charts, and several styles for each:

Figure 33.5
The Data Chart Gallery dialog box displays several styles for 11 different chart types.

NOTE

If you insert a new chart and change the chart type before adding data, WordPerfect changes the datasheet to show you, by example, what kind of data you need for each type of chart. You can also click Help in the Data Chart Gallery dialog box to access Presentations's online help, which shows examples of each chart type and describes in more detail how and when you typically use each type.

NOTE

If you click the Data Chart Gallery button on the toolbar, the palette presents only a limited number of gallery types.

33

- **Area**—These are like line charts, but are filled in from the line down to the X-axis (see Figure 33.6).

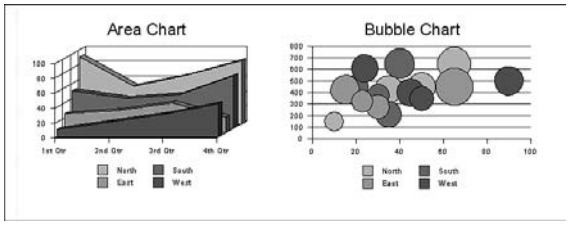


Figure 33.6
An area chart is like a line chart, with everything filled in between the X-axis and the data line.

- **Bar (Horizontal/Vertical)**—Each data point is represented by a bar in this commonly used type of chart (refer to Figure 33.5). Vertical bar charts plot values against the Y-axis, and horizontal charts plot against the X-axis. Bar charts work best when they represent relatively small amounts of comparative data. Otherwise, they can be confusing to the reader.

- **Bubble**—This type of chart is used to plot three different values on two axes (refer to Figure 33.6). For example, you can plot units sold (X-axis), gross profit (Y-axis), and net profit (the size or radius of the bubble).
- **High/Low**—Often used to show stock market fluctuations, the high/low chart plots three values: the value at the beginning of a specified time period, the value at the end of the period, and the spread between the highest and lowest points at any time during the period (see Figure 33.7).

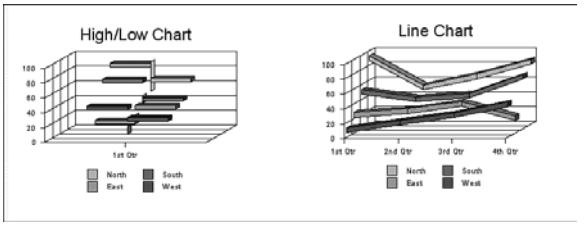


Figure 33.7
A high/low chart is often used to show stock market fluctuations.

- **Line**—This type of chart is excellent for showing trends, even with large numbers of data points (refer to Figure 33.7). For example, attendance over a one-month period, with 30 data points, is easier to visualize with a line chart than with a bar chart.
- **Pie**—Pies, by definition, are whole (100%, 1.0, and so on). The pie slices represent fractions of the whole. You can use up to nine slices in a single chart (see Figure 33.8).

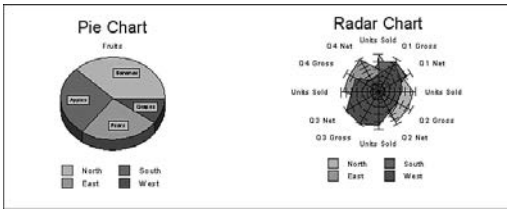


Figure 33.8
A pie chart represents parts of a whole (100%).

- **Radar**—This type chart enables you to compare the relative strength of several data points. For example, you can plot team statistics in several categories (refer to Figure 33.8), and easily see how each team compares.
- **Surface**—This type chart represents data values as a topography that bulges and dips like the contours of a landscape (see Figure 33.9). The color of the topography changes as the surface rises and falls. For example, you can use a surface chart to show business profits and losses as the peaks and valleys of a mountain range.
- **Table**—Although this appears to be just a fancy table, cells of the table can also reflect the values they contain by their shading (refer to Figure 33.9).

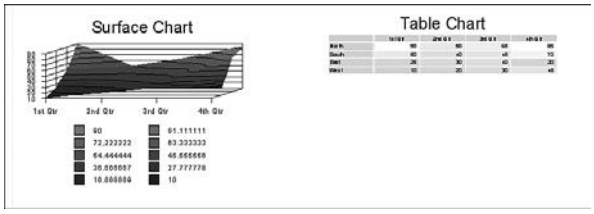


Figure 33.9
A surface chart shows peaks and valleys topographically.

NOTE

If you're used to working with WordPerfect tables, you'll find Presentations table charts quite limiting. Nevertheless, with some experimentation with table layouts, backgrounds, and font colors and size, you can create tables that approximate the kind you create in WordPerfect.

- **XY Scatter**—This type of chart is unique in that the top row of the datasheet contains values, not text labels (see Figure 33.10). The data points in the chart represent the relationship between the data in the series and the data in the top row of the table that appears on the X-axis.

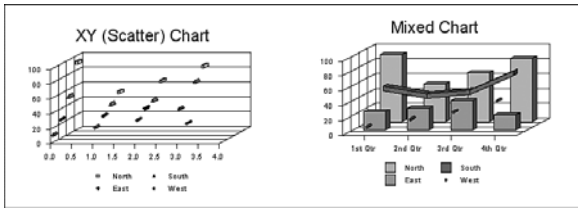


Figure 33.10
An XY scatter chart shows the relationship between the series data and the X-axis values.

- **Mixed**—Sometimes part of the data you want to show works best in a line chart, but another part is more understandable when represented by an area or bar chart (refer to Figure 33.10). You can use a mixed chart in this situation.

CHANGING CHART LAYOUT

You can further modify chart types by changing their layout. For example, you can choose to display the chart in a flat two-dimensional layout, or give it some depth by adding a three-dimensional layout.

Each chart type can be modified, albeit some more than others. Consider, for example, the bar chart type, which is a typical example of available layout options. To modify a chart layout, choose Chart, Layout/Type, or click the Layout button on the toolbar. Presentations displays the Layout/Type Properties dialog box (see Figure 33.11).

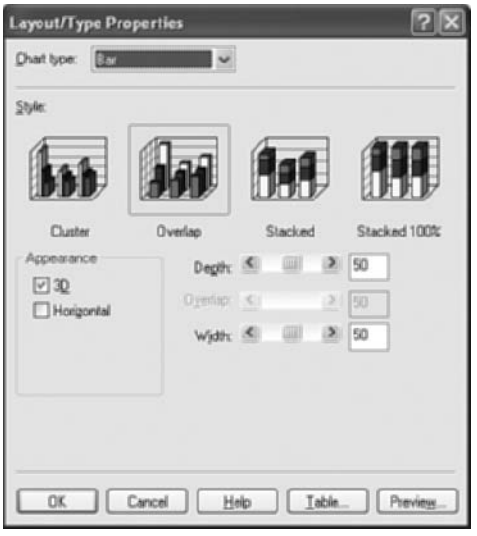


Figure 33.11
Use the Layout/Type Properties dialog box to choose chart layout options.

Among the layout choices for bar charts are the following:

- **Cluster**—Series bars are grouped beside each other.
- **Overlap**—Series bars are grouped, overlapping each other.
- **Stacked**—Series bars are stacked one on top of the other, with the height of the bar determined by the cumulative value of each bar.
- **Stacked 100%**—This option displays all the data points in a column as parts of the whole, just as a pie chart does. For example, 50 and 50 display at exactly the same height, as do 33 and 33.

Other options include 3D (including depth of the bar), No 3D (including amount of overlap), width of the bars, and horizontal orientation.

TIP FROM

Read Gilgen

Although 3D charts look nifty, a plain 2D chart can sometimes be more effective in communicating the information in the chart. Sometimes less is more.

The layout options for pie charts, another commonly used chart type, are shown in Figure 33.12.

These include the following:

- **Column**—This is a stacked 100% bar chart.
- **Proportional**—If you have more than one pie chart (remember, you can have up to nine pie charts), this option enables each to be smaller or larger, depending on the total value of the parts of the pie.

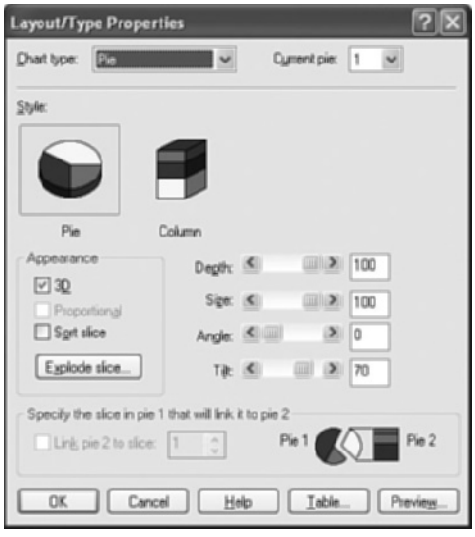


Figure 33.12
Options for changing pie charts are quite different from typical bar chart options.

- **Sort Slice**—Choosing this option arranges the slices of the pie in descending value, beginning at the 3 o'clock mark, and continuing counterclockwise around the pie.
- **Explode Slice**—If you want a slice to separate from the pie for emphasis, use this option. You can explode one or more slices from the pie (see Figure 33.13).

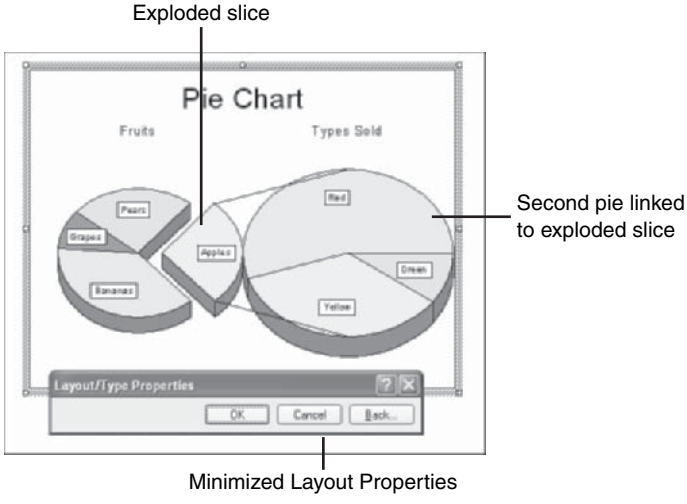


Figure 33.13
You can link a second pie to represent the details of a single slice in the first pie.

TIP FROM

Read Gilgen

The easiest way to explode a slice from a pie chart is simply to click the pie slice in the Chart Editor and drag it away from the pie.

- **Link Pie 2 to Slice**—This option, illustrated in Figure 33.13, enables you to show how a second pie in the same datasheet represents a single slice in the first pie. For this option to be available, you have to add data for Pie 2 in the Datasheet, and also click somewhere on Pie 1 before choosing Chart, Layout/Type.
- **Depth**—This measures the thickness of the pie (like the thickness of a coin), with 100 being the thickest and 0 being the thinnest.

NOTE

It may seem obvious, but you have to select the pie you want to change before you access the Layout/Type Properties dialog box.

- **Size**—This number is the percentage of the size of the other pie (for example, you can set Pie 2 at 50% the size of Pie 1).
- **Angle**—This refers to the location, clockwise, of the beginning of the first slice in the pie. By default, the first slice starts at the 3 o'clock position.
- **Tilt**—In addition to 3D depth, you can also modify the tilt of the pie. You can even tilt each pie differently.

Most of the other chart types include layout options similar to those described for bar and pie charts. If you're not sure what an option does, try it, and then click Preview to see the effect on the chart. Presentations then displays a minimized Layout/Type Properties dialog box (refer to Figure 33.13). Click OK to accept the changes, or Back to return to the full dialog box to make further changes.

TIP FROM

Read Gilgen

Without actually changing the chart, you can click Preview to see the effect of your changes in the chart. Presentations reduces the size of the Layout/Type Properties dialog box. Click Back to return to the full dialog box.

ADDING TITLES

After you complete the data in the datasheet and select a chart type and layout, you're ready to begin modifying the various chart elements that enhance the reader's comprehension of what the chart represents.

You can probably focus better on the chart if you hide the datasheet. Choose View, Datasheet to toggle the datasheet off, or click the View Datasheet button on the toolbar, or simply close the datasheet window.

Because Presentations data chart slide layouts already include a layout title, Presentations does not automatically display a title box in the Chart Editor. WordPerfect, however, does.

To add or change the title of the chart, choose Chart, Title, or in WordPerfect simply double-click the title box. Presentations displays the Title Properties dialog box (see Figure 33.14).

Figure 33.14
You can create or edit the title in the Title Properties dialog box.

TIP FROM

Read Gilgen

The easiest way to access the dialog boxes and options for modifying chart elements is simply to double-click the element you want to change. When you get used to this, you'll rarely use menus or buttons to change chart elements.

The Title Options tab enables you to edit the title in the Display Chart Title text box. If you uncheck that option, the chart displays no title. Finally, you can also specify whether to display the title at the left, center, or right of the chart.

TIP FROM

Read Gilgen

You can drag the title box anywhere you want in the chart-editing screen. However, if you want to return the title to its original position, right-click the title and choose Reset Text.

To change the look of the title, use the Title Font, Text Fill, and Text Outline tabs, each of which enable you to modify the text in attractive and interesting ways. For example, you can change the font, size, and color; modify the type of fill pattern used (including gradient shading); and add a line around the outside edge of each character (an outline line).

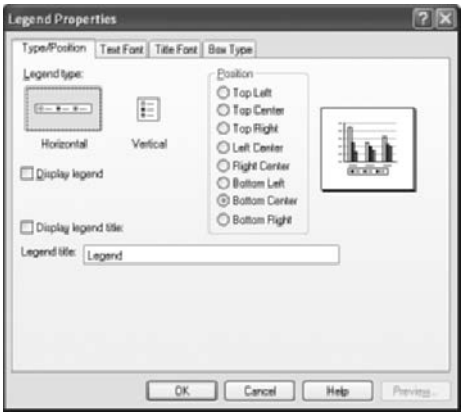
➔ For more information on modifying text using Presentations, **see** Chapter 30, "Getting Comfortable with Presentations."

Finally, you can add a box border around the title by choosing a style from the Box Type tab. If you choose a box style, Presentations gives you one more tab on the Title Properties dialog box for modifying the fill used with the title box.

ADDING AND MODIFYING LEGENDS

Legends help readers quickly identify what various elements on a chart represent. To add or modify a legend, choose Chart, Legend, or click the Legend button on the toolbar. Presentations displays the Legend Properties dialog box (see Figure 33.15).

Figure 33.15
You can modify the chart legend by using the Legend Properties dialog box.



On the Type/Position tab of this dialog box you can use the following options:

- **Legend Type**—The elements of the legend can be arranged vertically or horizontally.
- **Position**—Click an option and use the preview box to see where the legend will appear.
- **Display Legend**—If you don't want a legend—for example, if you need more room for the chart itself—uncheck this option.
- **Display Legend Title**—Most people recognize a legend when they see one, but if you want to make sure, or if you want to call it something else, choose this option and change the legend title.

The other tabs in this dialog box enable you to change the font of the legend labels or the font of the legend title, or to add a box around the entire legend.

MODIFYING X- AND Y-AXIS LABELS AND PROPERTIES

The X- and Y-axis options vary depending on whether they represent column headings (labels) or values. To discover the options for an X-axis that represents column headings, choose Chart, Axis, X. Presentations displays the X-Axis Properties dialog box (see Figure 33.16).

The Labels tab enables you to control how labels are displayed. Often labels contain more text than conveniently fits in the small amount of space available. The options on this tab include the following:

- **Display Labels**—You can, of course, choose not to display the labels at all. This isn't usually a real choice if you want your readers to know what the data relates to.

Figure 33.16
You can modify X-axis options with the X-Axis Properties dialog box.

- **Show Ticks on Labels Only**—If you skip labels, you then can specify whether you still want to show the tick marks.
- **Stagger**—You can stagger the labels so odd labels appear at one vertical position, and even labels appear at another.
- **Skip Labels**—You can choose predefined values (for example, skip all even labels), or specify how many to skip (for example, skip three to display every fourth label).

You can use the Label Font tab to change the font of the labels (column headings) or the title of the X-axis.

TIP FROM

Read Gilgen

> If your X-axis labels don't all fit, even after staggering the labels, try reducing the label font size.

The Title Options tab (see Figure 33.17) enables you to add a title to the Display Title box, and to display it. You can also display the title horizontally or vertically. Displaying an X-axis title vertically or a Y-axis title horizontally takes up so much space that it may force the data chart size to shrink dramatically.

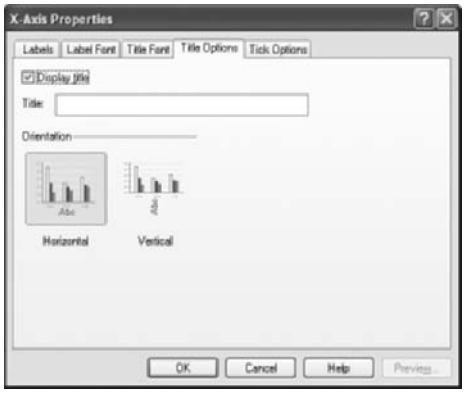


Figure 33.17
You can use the Title Options tab of the X-Axis Properties or Y-Axis Properties dialog boxes to add a title to the X-axis.

The Tick Options tab enables you to display major and minor tick marks, pointing away from the chart (out), or into the chart.

To discover the options for a Y-axis that represents numeric values, choose Chart, Axis, Primary Y. Presentations displays the Primary Y Axis Properties dialog box (see Figure 33.18). Font, title, and tick options are identical to those found on the X-Axis Properties dialog box.

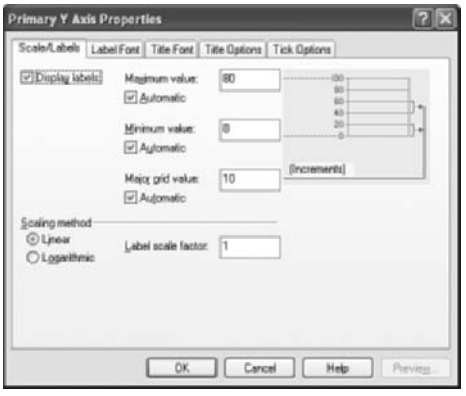


Figure 33.18
You can use the Primary Y-Axis Properties dialog box to establish how values display.

The Scale/Labels tab of this dialog box enables you to specify what values to display. Typically you use linear scaling, which enables you to set a maximum value, a minimum value, and the major grid value, which is the amount of increment between the numbers.

33

TIP FROM

Read Gilgen

If all the values are relatively high, you can distinguish the data points better by setting a higher minimum value. For example, showing the range from 80 to 100, instead of 0 to 100, makes it easier to tell the difference between a data point that represents 95 and one that represents 92.

NOTE

The options for X- and Y-axes are similar for all the data chart types except pie charts, which don't have a Y-axis, and table charts, which enable you to change the properties for table cells based on the values they contain.

EDITING SERIES ELEMENTS

A series represents all the data points in a row of the datasheet. Each series has its own color, shape, and style. To modify the properties of a series, double-click a series element, or choose Chart, Series, or click the Series button on the toolbar. Presentations displays the Series Properties dialog box (see Figure 33.19). You can select the series you want to change by clicking the forward or back buttons at the left of the Series box.

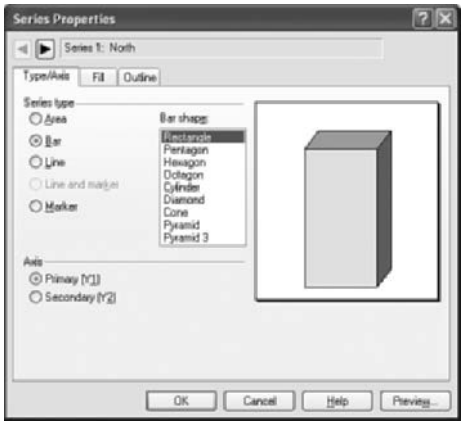


Figure 33.19
You can modify how series of data are displayed in the Series Properties dialog box.

If you're having trouble printing your chart so you can distinguish the different series, see "Printing a Contrasting Series in Charts" in the Troubleshooting section at the end of this chapter.

Series types, found on the Type/Axis tab of the Series Properties dialog box, include the following:

- **Area**—The data is represented as an area chart, the data points connected, and the area filled in, down to the X-axis.
- **Bar**—Several bar shapes are available, including cylinders, cones, pyramids, and so on. Even in 2D layouts, many of these shapes use gradient shading to simulate dimension.
- **Line**—Only one option is available: a line that connects data points in a series. However, you can use the Line tab of this dialog box to change the thickness, style, and color of the line.
- **Line and Marker**—This option is not available if the chart is 3D. You use markers to highlight the data points in a line chart.
- **Marker**—When used with lines, markers of different shapes and sizes can effectively distinguish between series. For example, for one series you might use a star, and for another, a triangle. You can also specify the size of the marker.

You can also choose to plot a series against a secondary Y-axis. In some charts, one series might be so different in value from the rest of the series that the differences in its data points are barely discernible. To remedy that, you can plot the series against a second Y-axis, scaled for the values in the series, which appears at the right of the chart. Select the series, and choose Secondary (Y2). The chart shown in Figure 33.20 shows the result of applying different series types, with one series (the markers) plotted against a secondary Y-axis.

Finally, you can use the Fill and Outline tabs of the Series Properties dialog box to modify the color, fill style, and lines of any of the series shapes.

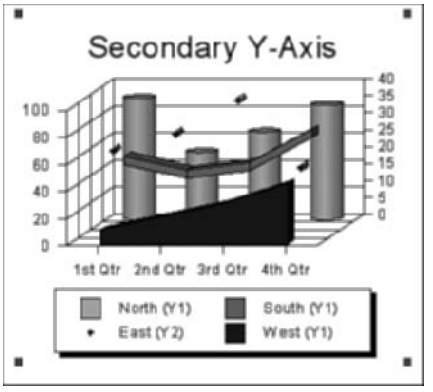


Figure 33.20
You can use a secondary Y-axis to set off a series of two markedly different values.

TIP FROM

Read Gilgen

If you single-click a series on the chart or the legend, you can use the Presentations toolbar at the left of the screen to choose fill style, colors, and lines.

Modifying Other Chart Elements

If you haven't already found enough options for modifying your chart, here are a few more (see Figure 33.21, which shows several of the following options).

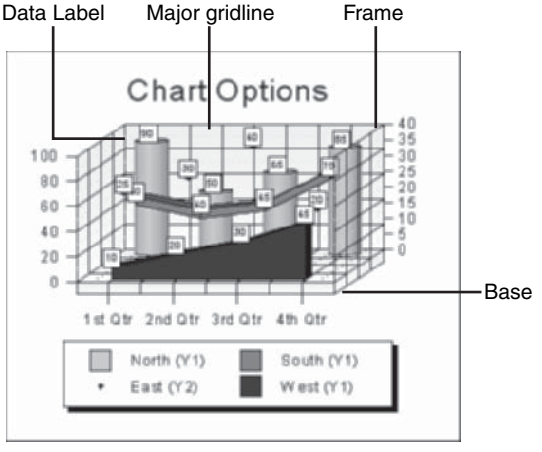


Figure 33.21
You can modify the frame and grid that surround a chart. Be careful that things don't get too cluttered!

You can easily modify the following chart elements:

- **Grids**—Grids help the reader quickly associate values displayed on the Y-axis with data points in the chart. To modify a chart's grids, choose Chart, Grids, or click the Grids button on the toolbar to access the Grid Properties dialog box. You can choose whether you want to display horizontal or vertical grid lines, what style and color you want to use, and how many major and minor gridlines to use. Major gridlines usually have

labels or values associated with them, and minor gridlines further subdivide the values of the major gridlines.

TIP FROM

Read Gilgen

Don't forget that you can change the elements of a chart most quickly by double-clicking the element to display its properties dialog box.

- **Frames**—Gridlines are contained inside a chart frame, which is like a border to the chart. To modify the chart frame, choose Chart, Frame. You can choose which sides the grids should appear on (for example, left, back, front, bottom, and so on), what line style and color you want, and whether to include a base.

- **Data labels**—Typically you display labels only on the X- and Y-axes. However, you can also display the values of data points by using data labels. Choose Chart, Data Labels to display the Data Labels dialog box, where you can choose the position (outside or inside series element) and the font and box style used to display the labels. The toolbar icon displays all labels, or turns them all off.

- **Perspective**—In 3D charts only, you can change the horizontal and vertical angles of the chart to change the chart's perspective. This sometimes helps make data more visible. To change perspective, choose Chart, Perspective, and make changes in the Perspective dialog box.
- **Base**—The platform on which the 3D chart sits is called the base. You can change its height in the Frame Properties dialog box.

ADAPTING CHARTS FOR SLIDES

It's easy to add all sorts of information to a data chart. However, in a slideshow, too much information can confuse audience members.

Just as you keep bullet points short and to the point, try to keep charts simple. If you need more complexity, consider adding information incrementally on a series slide. This way, viewers can see and understand each part of the chart as you present it.

Long sentences and complex data charts are more appropriate for printed WordPerfect documents that readers can peruse at their own pace than they are in a Presentations slideshow.

CREATING ORGANIZATION CHARTS

Organization charts (usually called org charts) visually show relationships between various persons in an organization. Presentations (also WordPerfect's Draw program) enables you to create and modify org charts, which then appear as graphics boxes in your slides, drawings, or WordPerfect documents.

To create an org chart, choose Insert, Organization Chart, and then single-click the editing screen.

TIP FROM

Read Gilgen

A quick and easy way to open an org chart in a WordPerfect document is to use a macro that comes with WordPerfect. Choose Tools, Macro, Play, and enter `wp_org`. The macro automatically opens a Draw window in Presentations and sets up a default org chart, ready for you to modify.

Presentations next displays the Layout dialog box (see Figure 33.22), where you choose an initial organization structure. Click the structure you want (the default is Single, Top Down) and click OK. If you're not sure which layout to use, select the default, which you can change later.

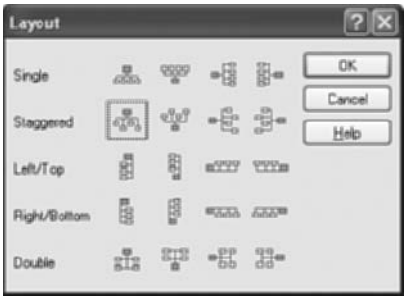


Figure 33.22
You must choose a layout for your org chart before you can proceed.

WordPerfect Draw places a basic org chart in the editing screen, and toolbar and Property Bar buttons appear to aid in modifying the chart (see Figure 33.23).

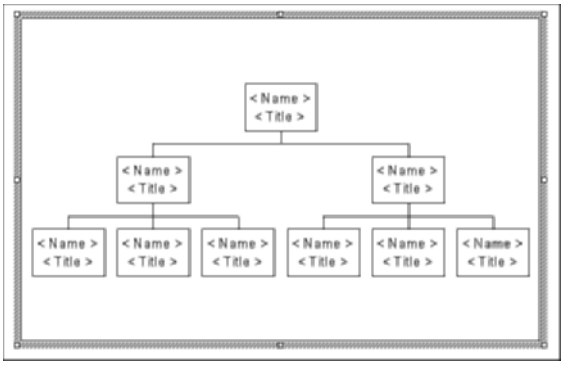


Figure 33.23
You can use Presentations tools to create or modify an org chart.

33

CHOOSING AN ORG CHART LAYOUT

Layout refers to the relationship and orientation of the boxes that represent persons in the organization. If you decide to change the layout you selected when you created the chart, follow these steps:

1. Choose Edit, Select All to select the entire org chart.
2. Choose Format, Branch Structure to access the Branch Layout dialog box (see Figure 33.24).

Figure 33.24
You can change the layout or structure of an org chart by using the Branch Layout dialog box.

3. Make changes as follows:
   - The Structure tab offers options that refer to how boxes at the same organizational level are laid out. The more boxes you have at the same level, the smaller they become. Staggering the boxes, or arranging them vertically instead of horizontally, might allow them to take up less space, and thereby become larger.
   - The Orientation tab of the Branch Layout dialog box enables you to make the org chart progress from left to right, right to left, top to bottom, or bottom to top.

If changes you make don't affect what you expect them to, see "Modifying an Entire Branch" in the Troubleshooting section at the end of this chapter.

ADDING AND REMOVING SUBORDINATES AND CO-WORKERS

The real work in developing the org chart comes in establishing relationships between various persons by adding, removing, and relocating boxes in the chart. Whether you organize the boxes first or fill in names and titles first doesn't really make much difference. Eventually you must do both.

To delete an individual, click the box and press Delete.

To add an individual, click a box near where you want to add the person. Then, depending of the type of box you want to add, choose one of these options:

- **Manager**—To insert a box above the currently selected box, choose Insert, Manager. Presentations inserts one box as the supervisor or manager.

- **Coworker**—To add a person at the same organizational level as the currently selected person, choose Insert, Coworkers. In the Insert Coworkers dialog box, choose how many co-workers to insert and whether they should go to the right or the left of the currently selected box.
- **Subordinate**—To add a subordinate to the currently selected person, choose Insert, Subordinates. The Subordinates dialog box enables you to specify how many boxes to add.
- **Staff**—A staff person is not part of the line authority of an organization. Thus, the relationship is shown with a dotted line, and the staff person is shown off to the side and beneath his or her supervisor (see Figure 33.25). To add a staff person, click the supervisor's box, and then choose Insert, Staff. In the Insert Staff dialog box, indicate the number of staff members to insert and click OK.

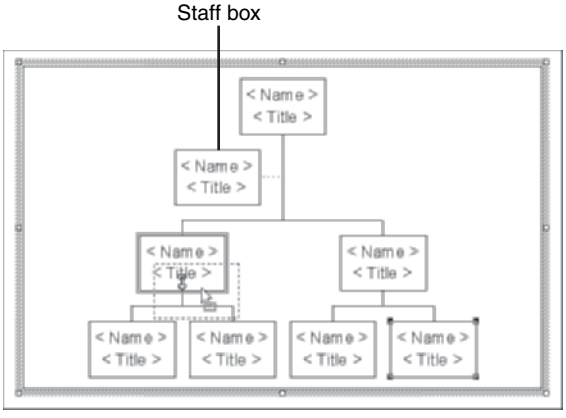


Figure 33.25
Staff boxes are connected with dotted lines, off to the side of the chart. You can move a worker by dragging the person's box to a new manager's box.

You can also rearrange the boxes by clicking and dragging them to new locations, using these options:

- To move a person to a different manager, drag the box to the manager's box so that the box being dragged displays a downward-pointing arrow (refer to Figure 33.25). When you release the mouse button, the box is added at the end of the list of co-workers beneath that manager.

CAUTION

When you delete or move a box, you really are moving the position in the organization, not just the person. Thus, moving a box also moves the entire branch beneath the box. If you want to move just the person—for example, because he or she took a new job and his or her position will be filled by someone else—delete the person's name from the box and add it to another box at a new location.

TIP FROM

Read Gilgen

If you accidentally remove a box or a branch, don't forget you can use Undo to get it back.

- To change the position of a co-worker, drag the box to another co-worker's box until a right- or left-pointing arrow is displayed (see Figure 33.26). Release the mouse button to place the person at the left or the right of the co-worker.

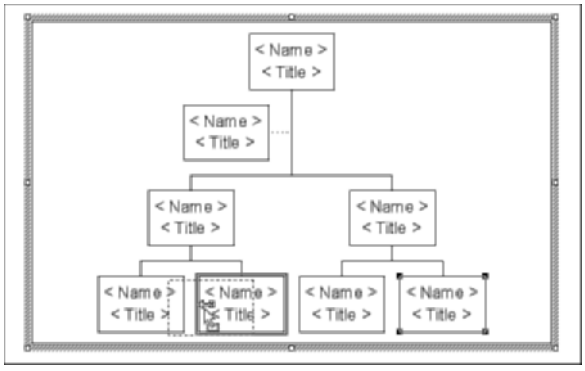


Figure 33.26
To rearrange the order of co-workers, drag a worker's box to another box until a horizontal arrow appears.

- You can copy a box by holding down the Ctrl key while clicking and dragging the box to a new location. Too bad adding new employees in the workplace isn't this easy!

ADDING AND MODIFYING ORG CHART BOX CONTENT

At some point, you have to enter names or titles in the boxes. Typically, you add text directly to org chart boxes. To do so, double-click a box, and Presentations enlarges the box enough to read the text and displays a cursor inside it (see Figure 33.27). Type the person's name, and then press Tab to advance to the next field (Title) in the box. You can also click elsewhere in the org chart to close this box.

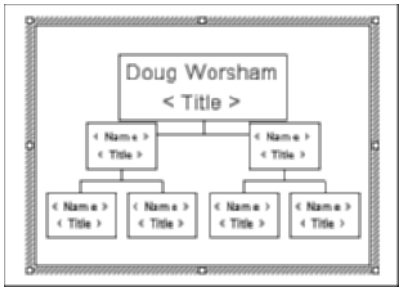


Figure 33.27
You can press Tab to move from field to field, and to add or edit org chart text.

TIP FROM

Read Gilgen

You can also import hierarchical data directly into a Presentations org chart from a WordPerfect outline by choosing Chart, Import. After you edit an org chart, you can export the data of the chart to a WordPerfect outline by choosing Chart, Export.

NOTE

If you don't replace the field code (for example, <Title>), the final org chart displays nothing for that field.

If you don't need the additional title field, or if you want to add other fields for each box, follow these steps:

1. Select the box or branch of boxes you want to change. To select a branch, click the top box in the branch, and then choose Edit, Select, Branch. Alternatively, you can right-click the top box in the branch and choose Edit Branch from the QuickMenu. To select all the boxes in the org chart, choose Edit, Select All.
2. Choose Format, Box Fields. Presentations displays the Box Fields dialog box (see Figure 33.28).

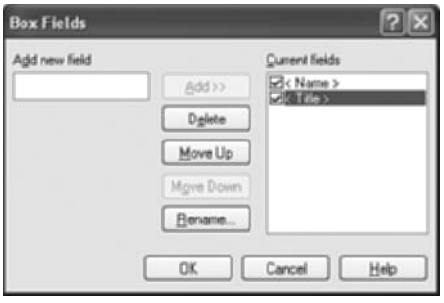


Figure 33.28
You can add or remove data entry fields for org chart boxes in the Box Fields dialog box.

3. To remove a field for the selected boxes, uncheck the box next to it in the Current Fields box. If you don't need the field at all, you can delete the field.
4. To add a different field, type a name for the field in the Add New Field box and click the Add button.
5. You can change a field by selecting it and clicking Rename, Move Up or Move Down (for example, to display the title above the name).
6. Click OK to accept your choices and to display the new fields in your org chart boxes.

CHANGING ORG CHART STYLES

The structure and content of the org chart are your primary concern, but you can also make your org charts look good.

To modify an org chart box, follow these steps:

1. Select the box or boxes you want to modify.
2. Choose Format, Box Properties, or right-click the box and choose Box Properties from the QuickMenu. Presentations displays the Box Properties dialog box (see Figure 33.29).

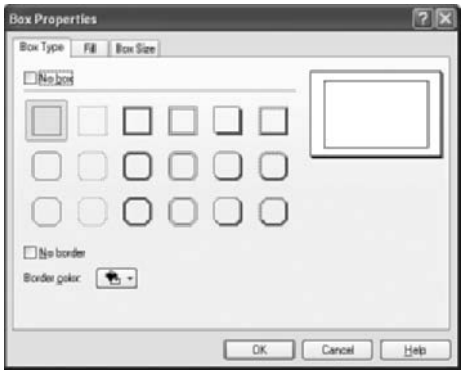


Figure 33.29
You can modify the style of org chart boxes by using the Box Properties dialog box.

3. On the Box Type tab, click the style you want to use. You can also change the border color.
4. On the Fill tab, change the fill pattern (including gradient shading) and color.
5. The Box Size tab enables you to adjust the size of the org chart's boxes. By default, boxes automatically adjust so that they become smaller as more boxes and text are placed at the same level. You can specify that boxes adjust instead to the largest size in the branch or the entire org chart. You can also force text to adjust its size to fit the box. If you manually adjust the box size, you can make boxes that are larger than those sized automatically. Note that you can reset the size options and start over again without having to cancel all your Box Properties dialog box choices.
6. Click OK to apply the properties to the selected boxes.

One nifty formatting feature is the capability to pick up the attributes from one box and drop them onto another box.

To pick up box attributes, click the box to select it, and then choose Format, Get Attributes or click the Get Attributes button on the toolbar.

To drop box attributes on another box, select the box or boxes you want to modify and choose Format, Apply Attributes or click the Apply Attributes button on the toolbar.

You can also modify connectors between boxes in the org chart. Select the branches you want to change (or select the whole org chart, if you want to change all connectors). Then choose Format, Connectors. In the Connectors dialog box you can choose whether to show staff or subordinate connectors, whether to use right-angle or direct connectors, and the line style, color, or thickness of each type of line.

TIP FROM

Read Gilgen

If you don't like either of the connector choices, you can deselect the Show Connectors boxes and then use Draw/Presentations tools to add your own lines or arrows as objects on top of the org chart.

You can also adjust vertical and horizontal spacing between boxes. This can be particularly useful if you want to make the org chart more proportional (as tall as it is wide, for example). Select the boxes or branches you want to adjust, and choose Format, Box Spacing. Presentations displays the Box Spacing dialog box. Adjust vertical spacing by increasing or decreasing parent-to-child spacing. Change horizontal spacing by adjusting sibling-to-sibling spacing.

COLLAPSING AND ZOOMING ORG CHART BRANCHES

If you create a large org chart to map the structure of your entire company, you can selectively display parts of that structure without having to delete sections you don't want to display.

To collapse the subordinates of a selection, click a box, and then choose View, Collapse Subordinates or click the Collapse/Expand button on the toolbar. Presentations hides the subordinates, but displays a small downward-pointing arrow in the box to indicate that there's more that you can't see (see Figure 33.30). When you return to your Presentations document, this indicator does not display. To expand the subordinates, click the arrow, or click the Collapse/Expand toolbar button again, or choose View, Expand Subordinates.

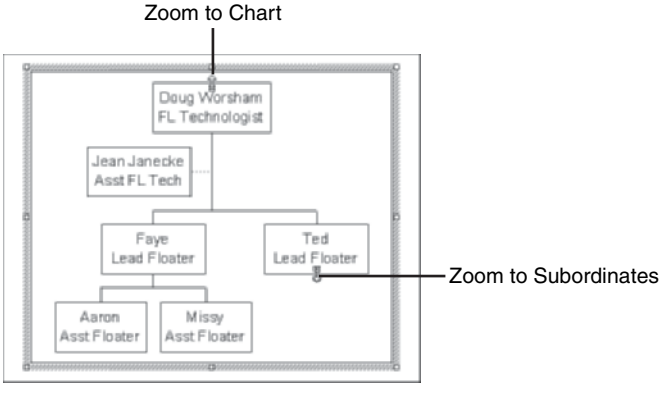


Figure 33.30
You can hide subordinates in the org chart, but an arrow indicates that they're still there.

To display only one section of the org chart—for example, a department or group—click the head of that part of the org chart and choose View, Zoom to Branch, or click the Zoom Branch button on the toolbar. Presentations hides all other parts of the org chart, and also displays an upward-pointing arrow at the top box of the zoomed branch (refer to Figure 33.30). To return to the entire chart, click that arrow, or click the Zoom button on the toolbar, or choose View, Zoom to Chart.

The ability to selectively collapse or expand an org chart can be particularly handy in a slideshow where you might need to show parts of the organization on different slides. You only have to create the org chart once, and then copy it to other slides and collapse what you don't need for that particular slide.

TROUBLESHOOTING

DON'T WORRY, JUST PRINT IT

When I'm editing my chart data, the chart looks great. But when I return to my WordPerfect document, the chart looks lousy.

What you're seeing is only a display problem. Don't worry. When you print the chart, it will look just fine.

SAVING IT ANYTIME

I sorted data in my datasheet, but I did it wrong and can't remember what it looked like. There doesn't seem to be any Undo.

Unfortunately, Undo doesn't work while you're editing a chart. But you can save as often as you like. Simply click the Save button on the toolbar, or press Ctrl+S. That way, if you make a mistake, just exit the WordPerfect document, and open the last saved copy. You should always save your work before trying something new or complicated. Did you already lose your work? Sorry, but now you'll know for the next time.

PRINTING A CONTRASTING SERIES IN CHARTS

In my document, the data charts look fine, but when I print them, I can hardly distinguish among the different chart series.

This is common when you print to a black-and-white printer, such as a laser printer. You can try to change the series colors to use clearly different shades of gray, but if you have more than a few series, this might not be satisfactory. A more effective solution is to change the fill patterns of the series so they clearly contrast (for example, diagonal lines in different directions).

MODIFYING AN ENTIRE BRANCH

I changed the layout of my org chart, but only part of the chart changed.

You must select all the branches you want to change. To select the whole chart, choose Edit, Select All.

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CHAPTER 34

Formatting and Customizing Presentation Slideshows

In this chapter

by Read Gilgen

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Designing Effective Slides

An effective presentation is one that achieves its objectives of communicating ideas, teaching concepts, or convincing or motivating listeners. Do your slides help you do that? Or are they simply electronic equivalents to textual outlines that people could easily read for themselves?

NOTE

> Unfortunately, it's beyond the scope of this book to provide a comprehensive treatment of public speaking, learning theories, motivational psychology, or the like. However, successful presenters do take time to learn about these topics, and so should you. At the very least you should take the time to observe other presenters and take mental notes about what seems to work and what doesn't.

Getting the Right Content

Effective presentations don't happen by accident. They require a different approach, one that is considerably more visual and auditory than what you use when preparing a position paper, for example. Thus you will spend more time making sure slides contain visual elements that support the message or concept of the slide.

That effort is wasted, of course, if you don't know just exactly what it is you want to accomplish. In other words, what is the *objective* of your presentation? Are you teaching technical information, or entertaining for an after-dinner crowd? Who's the audience and what do they expect out of your presentation? What new things should they know when they leave? Or are you trying to motivate them to do a better job with the information they already have?

Having your objective in mind helps you select, organize, and present the right kind of material. At each step along the way, you ask yourself, "Will this help me reach my objective?" If it doesn't, you probably need to consider eliminating it, no matter how interesting it is to you personally. That doesn't mean you eliminate supporting material altogether. Like an experienced tour guide, you need to keep your objective in mind, but you also need to know when it's appropriate to take a little side trip. Nevertheless, you should always make sure you return to the main road.

Making Color, Font, and Font Size Work for You

In addition to the content of your slideshow, you also need to consider how the slides look. They must be attractive, but not distracting. You want your audience to hear *what* you say, and not even think about *how* you're saying it.

One often-overlooked element of successful presentations is the use of colors and fonts. If you're just starting out, it's likely that you've been using Presentations's predefined backgrounds and color schemes. That's actually a good idea because the creators of Presentations have built their designs with good color and font combinations in mind.

You soon discover that you can control nearly every aspect of a Presentations slideshow, including backgrounds and background colors, fonts and font sizes, and colors. However, because these visual elements can be nearly as important as text and graphic content in conveying your message, you should be aware of some of the guidelines that can help you use these effectively. You at least need to know the rules before you can break them!

Anyone can show you color charts and explain theories about primary and secondary colors, complementary and analogous colors, and so on. But the real test as to whether colors work well together is how the audience sees them and reacts to them. In particular, can the audience see and read the text, and do the colors add to the mood or feeling you're trying to create? This subject deserves a more comprehensive treatment than what we can provide in this chapter, but here are a few suggestions:

- Try using Presentations's color schemes before branching off on your own. If you like the effect one of these schemes provides, it's quite probable that your audience will, too. Ask an office colleague or a friend what he thinks to get someone else's take.
- White and very light colored backgrounds often give the best contrast for text or graphic images. However, such backgrounds are awfully bright, especially in darkened rooms, making it hard for the audience to look at them for a long period of time.
- Darker colors can be used to set a mood. Blue is soft and soothing, while red and orange suggest passion or action. Green is life-giving and positive. Of course, color can't do all the work. You can use a bright yellow background and still put people to sleep with a lifeless presentation.
- Gradient shades and textured backgrounds can add a touch of professionalism to a slide and can be more pleasing to the eye than a solid-color background (see Figure 34.1).

Figure 34.1
Gradient or textured backgrounds provide a soft backdrop for text and other content.

- Be particularly careful with solid-color backgrounds and colored text to make sure it's readable. For example, red on dark blue or green is very difficult to read.
- Be aware that many people have some form of color-blindness, red/green being the most common. Avoid color combinations that depend on these colors for contrast. In fact, avoid anything that depends totally on color contrasts.

Many rules exist regarding fonts and font sizes. When it comes right down to it, however, all you need to do is find a font and font size that's easily readable, not only by someone in the front row, but also by those in the back row.

As for fonts, consider the following:

- Try to limit the number of fonts used in a slideshow. Select one or two basic fonts and stick with them. Try to be consistent in terms of style, color, and size.
- Serif fonts, those that have little feet on them, like the type in this book, are easier on the eyes than sans-serif fonts when used in printed text. However, they tend to be harder to read than sans-serif fonts when used on a Presentations slide. If you use a serif font, such as Times Roman, make sure the text is large and that there's not much of it (see Figure 34.2).

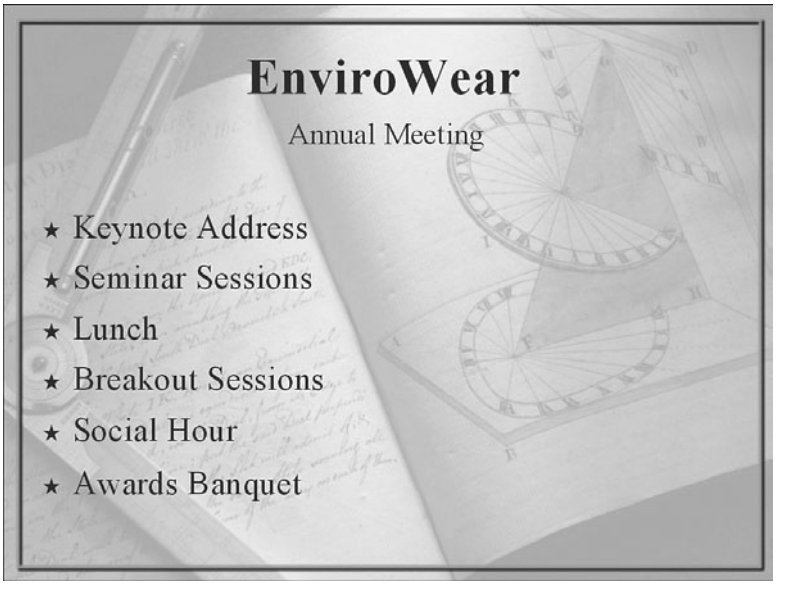

Figure 34.2
Serif fonts are harder to read than sans-serif fonts on a Presentations slide.

- Sans-serif fonts, such as Arial and Tahoma, are usually easier to read than serif fonts on a Presentations slide, especially for the small text sizes typically used in lists, bullets, and quotes (see Figure 34.3).

Figure 34.3
Sans-serif fonts are easier to read than serif fonts on a Presentations slide.

- Traditional fonts, such as Arial and Times Roman, are considered *neutral* fonts in that they're common enough that they don't attract undue attention.
- Fancy fonts, such as cursive or theme fonts, should be limited to very specific situations, where the font lends to or supports the meaning of the slide—for example, the corporate theme font (see Figure 34.4). Otherwise, the font is merely distracting.

Figure 34.4
Fancy fonts may be hard to read and can be distracting. Special fonts should have a purpose and should be reserved for slide titles or other large font text.

Choosing the right size of text involves using something that's large enough to be read easily. Fonts are measured in such a way that a specific point size may look larger or smaller on different fonts. A 44-point font in Arial might be perfect, but in a script font it might be too small (see Figure 34.5).

Figure 34.5
Point size doesn't mean much on a Presentations slide; both of these fonts are the same point size (44 points).

If you're not sure if your text can be read by those in the back row, try it out yourself. If you can read it comfortably from a back-row distance, the text is large enough.

CAUTION

> One problem we all face some time or another is that we try to cram too much text onto a single slide. In the case of text and Presentations, less is more. Make your bullet points succinct, and keep them to only a few per slide (refer to Figure 34.3). If you find yourself needing more space, create a new slide instead of cluttering one slide with too much information.

Another problem that often occurs when you're experimenting with color schemes is that text is very readable on one part of the screen, but if it crosses a graphic image or a different color on the background, it becomes hard to see. Unfortunately, you can't do much with text in titles, subtitles, and bulleted lists, other than choose a font that contrasts well. However, you can replace placeholder text with text box objects, to which you can add text shadows that contrast with the background. For example, light text with a dark gray or black shadow is legible on nearly any kind of background (see Figure 34.6).

Figure 34.6
You can add shading to text to contrast with all backgrounds.

Modifying Slide Properties

One of the first questions most presenters ask is whether one can change slide backgrounds or other slide properties. Although the answer is "yes," you should seriously consider whether or not you *should* make such changes.

Predefined slide designs offer several advantages, including the following:

- Background designs are clearly professional looking
- Color schemes are coordinated to enhance visibility and communication
- Font sizes are usually just right for any size audience
- Layouts are coordinated with background designs
- Data and org chart colors coordinate with the background design
- Slide designs provide a consistent look to all of your slides

On the other hand, good reasons to make changes to slide properties might include the following:

- You need to use specially designed backgrounds, incorporating, for example, a company logo
- For a particular slide, the background might be an unnecessary distraction
- Based on your audience, you may need to jazz up or tone down the slide design
- Based on the information you're presenting, you may need a layout that isn't among the standard layouts

In short, you should resist making major slide design changes until you get a chance to work with the predefined designs that come with Presentations. At the very least, consider how the various parts of a slide design work together and only make changes that work well with other slide properties.

Each slide consists of three layers: background, layout, and slide. Typically, you work with the slide layer. To modify the look of all slides, you work with the background and layout layers. If you want to create a look that you can use over again, you can save these two layers in a master (template) file.

WORKING WITH SLIDE BACKGROUNDS

Slide designs range from blank, or no background design, to complex collections of background design, color combinations, fonts, bullet styles, and so on. Often you begin creating a slideshow by first choosing a design from the design gallery.

You can easily change the overall design of your slideshow, including background, colors, fonts, and so on, by choosing Format, Master Gallery, or by clicking the Master Gallery button on the toolbar. Presentations displays the Master Gallery dialog box that you see when you first create a slideshow (see Figure 34.7).

Figure 34.7
Choose attractive and effective slide designs from Presentations's Master Gallery.

Select a category from the drop-down list, and scroll to find a layout that suits your needs. If, after you select a new design, you don't like the results, you can always select another design.

CAUTION

> Changing the slide design also changes colors, fonts, and sometimes layouts. In particular, you need to visit each slide in your slideshow to make sure text appears where it should, and doesn't wrap inappropriately. If it does, you must edit the text (for example, fewer words), reduce the font size, or resize or move the text box. Changing the font or font size might not be appropriate, so if you have many slides that need such modification, you might consider using a different design.

CHANGING SLIDE DESIGN BACKGROUNDS

To make basic changes to slide design backgrounds, choose Format, Background Gallery, or choose Format, Slide Properties, Appearance. Presentations displays the Appearance tab of the Slide Properties dialog box (see Figure 34.8). Here you can change the layout or background for any or all slides in your slideshow.

Figure 34.8
Choose different backgrounds or layouts from the Appearance tab of the Slide Properties dialog box.

If you simply want the current slide to omit the design background, click the blank background to the right of the slide design background. This removes the background, but all other design elements remain intact, including font size and colors. If your slide still contains text, make sure that it's visible with a blank background. Otherwise, you may also have to change font colors.

NOTE

> Omitting slide backgrounds is most useful when your slide has no text and a relatively large graphic image, such as a screenshot, a photograph, or a chart, and where the slide background is unnecessary or distracting.

You can also select a different background design from the background gallery. Select a category from the drop-down menu, and then choose a different background. However, note again that only the background design changes. Make sure that fonts and color combinations are appropriate for the newly chosen background. For example, a blue-themed data chart might not look particularly good on a green-themed background design. Likewise, light text designed for dark backgrounds might not be visible on lighter backgrounds.

Finally, you can easily select, preview, and apply backgrounds to all slides in your show using the Slide Properties dialog box. Each time you select a different background, the preview box displays the results. You can choose Apply Selected Background to All Slides in Slide Show to make a universal change, or you can click the left or right arrows in the dialog box to move from one slide to the next and decide individually to apply a different background. You can also click the slide drop-down list to jump to a particular slide to make a change.

CREATING CUSTOM DESIGN BACKGROUNDS

If you really can't find the right background design, or you have specific needs in a background, such as a corporate logo, you can easily edit the background layer, or create new background layers for specific slide types. Although this isn't terribly difficult, you will need to bring to bear many of the skills you've learned so far such as how to create and manipulate background fills, graphic images, and so on.

➔ To learn how to work with graphic images, **see** "Inserting Graphic Images," **p. 308**.

➔ To learn how to work with text boxes, **see** "Creating Title Boxes," **p. 776**, "Working with Bullet Boxes," **p. 779**, and "Adding Text Boxes," **p. 784**.

➔ To see how to modify graphic objects, **see** "Working with WordPerfect Clip Art," **p. 796** and "Adding Drawings by Using Presentations," **p. 800**.

TIP FROM

Read Gilgen

> Although you want to be bold and go where no one else has gone before, before you create a custom design background from scratch, you should consider starting with an existing one that's close to what you're looking for. Then customize that background as described in this section. You can save a lot of time and effort by building on the work someone else has already done for you.

To modify the background layer, or to create new backgrounds, choose Edit, Background Layer, which takes you to the Background Layer editing screen (see Figure 34.9).

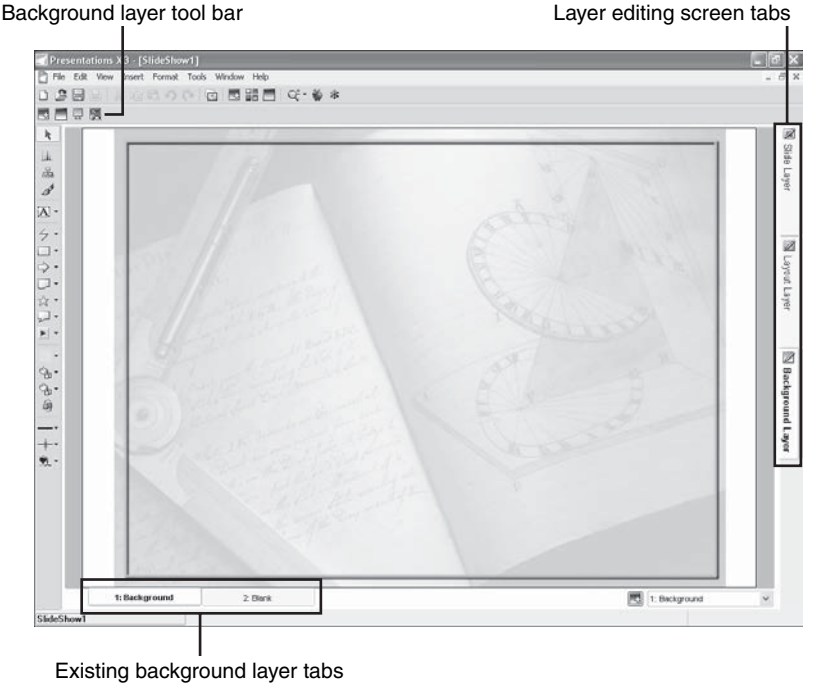

Figure 34.9
Create or modify backgrounds in the Background Layer editing screen.

By default, most slide designs have only two backgrounds: the design background and a blank background. You can alter these backgrounds, but you can also create new backgrounds for specific needs. For example, you might want a slide number at the lower right of every slide except the title slide. Thus you could create a separate background for just the title slide.

To create a new background based on an existing background, follow these steps:

1. From the background layer screen, choose Insert, New Background, or click the New Background button on the toolbar. Presentations displays the New Background dialog box (see Figure 34.10).

Figure 34.10
Naming new backgrounds helps you find and use them later.

2. Supply a name for your background and click OK. It's a good idea to choose a name that indicates the background's probable use, for example, Titles.
3. To create the actual background for your new background, you can use the following options:
   - If you want the same basic background as the default background, choose Format, Background Gallery, click the background you want to use, and click OK.
   - If you want to use a completely different background design, choose Format, Background Gallery, choose a new category from the category drop-down list, select a background, and click OK.
   - If you want to create a background of your own, for example, a gradient fill, choose File, Page Setup, and in the Page Setup dialog box, click the Fill tab (see Figure 34.11, which shows a gradient fill already selected). Choose the type of fill you want, and click OK.

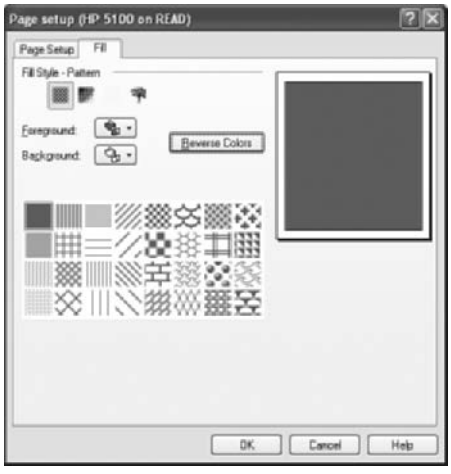

Figure 34.11
The Fill tab of the Page Setup dialog box is useful for creating basic colored and gradient shaded backgrounds.

CAUTION

> If you choose another background design for a background that uses page setup fills, the fill style gets deleted. You then have to choose a blank background and use Page Setup again to get back the fill.

4. Add graphic images that you want to be part of this background, for example, a small corporate logo, or a thematic graphic design.
5. Add text boxes that you want to appear on this background.

NOTE

> Background layer text should relate to the appearance or design of the background more than to relevant content. For example, typical footer information such as date, title, or page number, should be inserted on the layout layer instead of the background layer.

You can return at any time to the Layout or Slide layers by clicking the appropriate tab at the right side of the screen.

WORKING WITH SLIDE LAYOUTS

Like slide design backgrounds, slide layers are designed to give your slides a consistent look. For example, the title box appears in exactly the same place on each slide.

CAUTION

> Although you can resize or reposition layout elements, such as title boxes, while at the slide layer, try to avoid doing do so. If such elements appear in different locations or sizes on each slide, audience members will notice and will begin to pay more attention to layout changes than to what you have to say.

USING PREDEFINED LAYOUTS

To change the slide layout for a given slide, simply click the Select Layout button on the toolbar, and click the layout you want to use (see Figure 34.12).

Figure 34.12
Change layouts quickly using the Select Layout button on the toolbar.

Alternatively, you can choose Format, Layout Gallery, or choose Format, Slide Properties, Appearance. On the Appearance tab of the Slide Properties dialog box (refer to Figure 34.8), select a different layout, which applies to the current slide only.

If you simply want to work with a blank layout, select None from the list of layouts. This is particularly useful if you need greater flexibility in what you include on your slide, and where you want it located.

Content stored in layout elements disappears if you select a layout that doesn't include that element. For example, if you change a bulleted slide to a title slide, the title remains but the bulleted text disappears. Choosing a blank layout hides all layout element content. Changing layouts does not affect text or graphic objects placed on the slide layer.

If you lose content after changing a layout, see "Where Are My Bullets?" in the Troubleshooting section at the end of this chapter.

CREATING CUSTOM LAYOUTS

Although you can resize, reposition, change the properties, or even delete layout elements while in the Slide Editor, if you want a consistent look to your slideshow, you should make such changes to the underlying layout layer, which is like a master gallery of layout styles.

To access the Layout Layer Editor, choose Edit, Layout Layer. Presentations switches to the Layout Layer screen (see Figure 34.13).

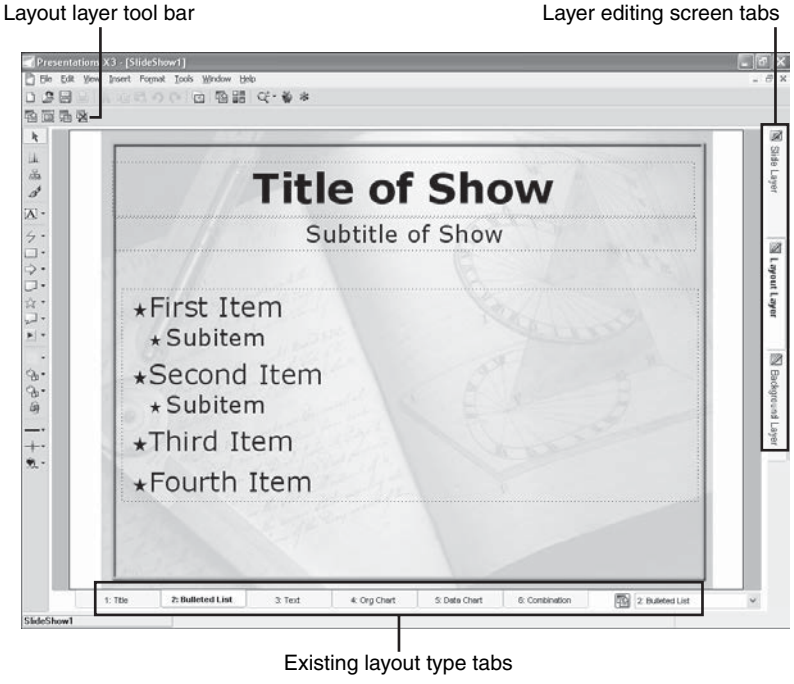

Figure 34.13
The Layout Layer editing screen is used to modify layout elements such as titles, text boxes, and footers.

Layout styles are of two types: those that can be filled in and edited at the slide layer level, and those that cannot be changed at the slide layer. For example, if you include a title box at the layout layer, you can fill it in at the slide layer. If you add a regular text box at the layout layer, you have to add text to it while in the layout layer. That text then appears on all slides using that layout.

A slide layout can contain only one of each of the following editable items:

- Title
- Subtitle
- Bullet Box *or* Text Box
- Data Chart *or* Org Chart
- Footer (including Date/Time, Footnote, and/or Page Number)

Suppose you want to create a custom layout that includes only a title, a bulleted list on the left side only, and date and page number (see Figure 34.14). Follow these steps:

Figure 34.14
Custom layouts help maintain a consistent look for slides that use that layout.

1. Access the Slide Layout layer by choosing Edit, Layout Layer.
2. Choose Insert, New Layout, or click the New Layout button on the toolbar.
3. In the New Layout dialog box, provide a name for the layout, for example, Left Bullets.
4. Select Insert, Bulleted List, or choose Create a Bulleted List from the Text Object tools button on the tool palette.
5. Click anywhere on the slide screen. Presentations displays a Create Text Holders dialog box (see Figure 34.15).

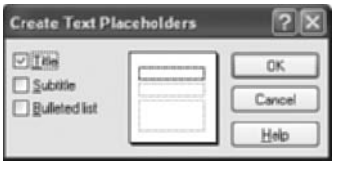

Figure 34.15
Add editable text boxes to a layout, such as titles, subtitles, and bulleted lists, from the Create Text Holders dialog box.

6. Check the Title and Bulleted List boxes and click OK. Presentations inserts each type box.
7. Click anywhere outside the title box.
8. Select the title and move it to the desired location. You can also size the box the way you want it.

9. Select the bullet box and move it to the left side. Drag the right sizing handle until the right side is about in the center of the slide.
10. Choose Insert, Footer, Date/Time. By default Presentations places this at the lower-left corner of the slide. If you want, you can resize or reposition it.
11. Finally, choose Insert, Footer, Slide Number. By default, Presentations places this at the lower-right corner of the slide.

If you click the Slide Layer tab you return to the Slide Editor. Click the Slide Layout button on the toolbar to see or select your new layout style.

MODIFYING LAYOUT ELEMENTS

In addition to moving and sizing layout elements, you can also change their properties, such as box borders, or text attributes.

Again, although you can make such changes at the slide layer, for consistency it's best to make these changes at the layout layer.

Suppose, for example, that you want your slide titles to be in a different font, using gradient shaded text, and underlined with a special graphic line. Follow these steps that are typical for most layout element changes:

1. Access the layout layer (Edit, Layout Layer) and click the tab of the layout style you want to edit (for example, the Left Bullets style you created in the preceding section).
2. Select the title box and choose Format, Title Properties, or right-click the box and choose Title Properties. Presentations displays the Title Properties dialog box (see Figure 34.16).

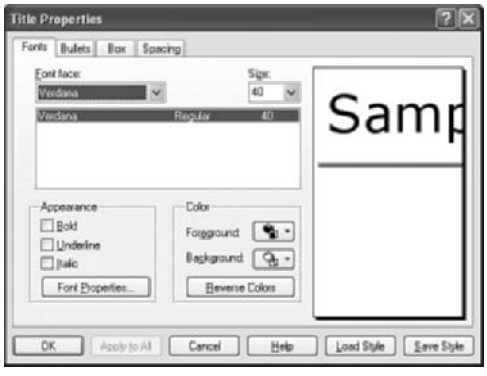

Figure 34.16
Make basic font changes in the Title Properties dialog box.

3. Choose a new font face. If you're making simple changes do so in this dialog box. Otherwise, click Font Properties to access the Font Properties dialog box (see Figure 34.17).

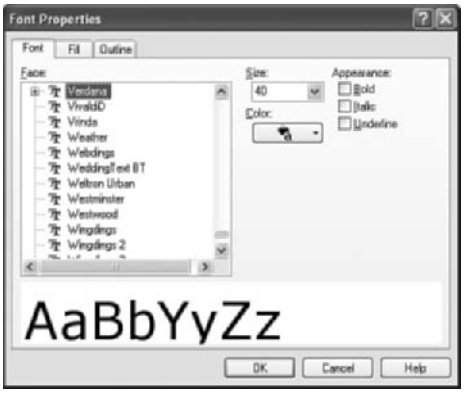

Figure 34.17
Make detailed font changes in the Font Properties dialog box.

4. Choose the font face, size, and color.
5. Click the fill tab to choose gradient shading, or other fill options.
6. Click the outline tab to change text outline style or color.
7. Click OK to return to the Title Properties dialog box.
8. Click the Box tab (see Figure 34.18, which shows several options already chosen).

Figure 34.18
Add lines to any side of a Title box using the Box tab of the Title Properties dialog box.

9. Choose which box lines you want, for example, Below, to create an underline. Presentations displays your choices in the preview box. You can also choose other options such as corner and frame styles.
10. Click OK to return to the Layout Editor screen.

You can make similar changes to bulleted lists and footer elements, including text and box changes.

CREATING MASTER TEMPLATES

After you spend a lot of time getting a slideshow design just right, wouldn't it be nice if you could reuse it with other newly created slideshows? The good news is that you can!

Presentations's Design Gallery consists of several slide masters, created by artistic developers at Corel. You can also save the designs you've created as masters, and add them to the Design Gallery.

To save and reuse a design from the Design Gallery, follow these steps:

1. Create the various backgrounds and layout styles that you want to include in your custom design.
2. Go to Tools, Settings, and click the Files icon.
3. In the Masters Folder box, select and copy (press Ctrl+C) the path to where the masters are kept, for example, C:\Program Files\WordPerfect Office 13\Languages\EN\Masters.

NOTE

> Although you can save your design as a master in any location, Presentations won't know where to find it when it opens its Design Gallery unless you save it in the location where other masters are stored.

4. Click Cancel, and then Close to return to Presentations.
5. Choose File, Save As to display the Save As dialog box.
6. In the File Type box select Presentations Master 7/8/9/10/11/12/13.
7. Replace the filename with the path you copied in step 2 and click Save. Presentations takes you to the specified location.
8. Double-click a category folder, for example, Theme.
9. Provide a name for your master and click Save.

CAUTION

> Presentations saves only the background and layout information in the master file. All other content is discarded. If you have added content too, be sure to save the file as a regular Presentations show (.shw) before or after you save it as a master.

To use a saved master, just start up Presentations and when asked to choose a design from the Startup Master Gallery, select the appropriate category and then select your design master. You may have to exit Presentations completely and start Presentations again before your master shows up in the gallery, but it will show up eventually.

If you can't find your slide design master, even if you saved it correctly, see "Where's My Master?" in the Troubleshooting section at the end of this chapter.

Troubleshooting

Where Are My Bullets?

I spent a lot of time creating some bullets, but when I changed layouts they disappeared. What do I do?

Fortunately, this problem is fixed easily. Simply choose the Bulleted List layout again and your bullets will reappear.

Layout elements that aren't part of the currently selected layout are hidden, not deleted.

Where's My Master?

I created and saved a design master just like you said, but I can't find it in the Design Gallery.

Presentations has to have an opportunity to "see" new design masters. This may require exiting Presentations and starting again. You can also choose Format, Master Gallery, or click the Master Gallery button on the toolbar, and then select the appropriate category. Your master should now appear.

If after several attempts you still don't find it, it's possible you forgot to save it in one of the category folders. Use your file explorer to locate it and copy the master to the appropriate folder.

CHAPTER 35

Preparing and Presenting a Slideshow

In this chapter

by Read Gilgen

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Preparing to Make a Presentation 871

Troubleshooting 885

PREPARING A SLIDESHOW

To this point you have focused on the content of a slideshow and how to make that content as effective as possible. The time soon comes, however, when you have to make the presentation. This section focuses on things you can do to entire slides or groups of slides as you get your slides ready for a presentation.

USING THE SLIDE SORTER

A great way to get an overview of your slideshow and to rearrange slides in their proper sequence is to use the Slide Sorter. Click the Slide Sorter tab at the right side of the screen, or choose View, Slide Sorter (see Figure 35.1).

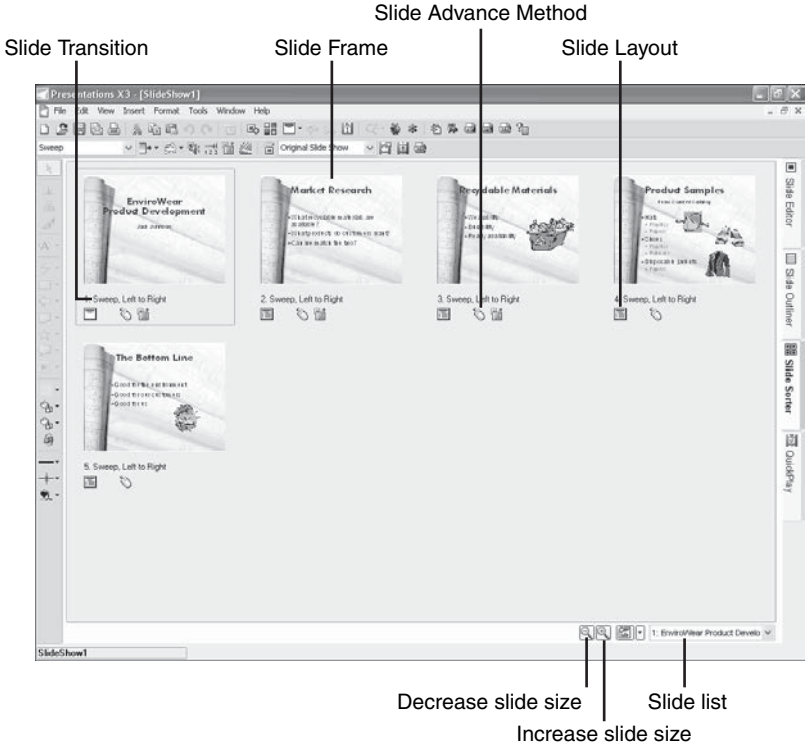

Figure 35.1
The Slide Sorter view enables you to organize and rearrange slides quickly and easily.

To move a slide in the Slide Sorter, follow these steps:

1. Select the slide you want to move.
2. Click and drag the slide where you want to insert it. Presentations display a red vertical bar where the slide will go when you release the mouse button.
3. Release the mouse button to deposit the slide.

This is, essentially, cutting and pasting a slide. Thus you can use other cut, copy, and paste methods to move slides as well. For example, if you hold down the Ctrl key, you can click and select more than one slide to move. If you hold down the Ctrl key while dragging the slide or slides, you copy the slides to the new location, leaving the originals where they were.

If you select a slide and press Delete, you can delete a slide after confirming that you want to do so.

CAUTION

> Deleting a slide in the Slide Sorter *cannot* be undone! Be sure you want to delete a slide before answering "yes."

SKIPPING SLIDES

As you consider the slides in a slideshow and their sequence, sometimes you find a slide that just doesn't quite fit. You can delete the slide, of course, or you can tell Presentations to skip the slide when playing, but leave it in the slideshow in case you need it later.

To skip a slide, choose Format, Slide Properties, Appearance. Then check the Do Not Include This Slide (Skip) check box and click OK. Uncheck the box if you want to include it again in the slideshow. You can also click the Skip Slide button on the property bar. When a slide is marked to be skipped, this button also appears selected. You can also check the slide list at the lower-right corner to see if a slide is skipped or not (refer to Figure 35.1).

TIP FROM

Read Gilgen

> You can also use skipped slides to hold extra material that you might not use. You can jump to a skipped slide while playing the slideshow or by linking to it with an action setting. Otherwise, Presentations skips over the hidden slides without the audience ever knowing it.

CREATING CUSTOM SLIDESHOWS

Presentations's Custom Audience feature enables you to take advantage of skipping slides to create subsets of your presentation for different audiences. For example, an explanation of your ground-breaking stem-cell research might involve lots of detailed slides for your professional colleagues but a considerably scaled-down presentation for an alumni association gathering.

To create a Custom Audience, follow these steps:

1. Go to the Slide Sorter view.
2. Select the slides you want to skip by holding down Ctrl and clicking each one.
3. Click the Skip button on the property bar.
4. Choose Tools, Custom Audience. Presentations displays the Custom Audience dialog box (see Figure 35.2, which shows a new audience type already created).

Figure 35.2
Custom Audiences are subsets of a slideshow.

5. Choose New and type the name for your custom audience, for example, Alumni Presentation.
6. Click OK to return to Presentations.

To use a Custom Audience, click the Custom Audiences drop-down list on the property bar to select it.

NOTE

> Although you can use Custom Audiences to choose which set of slides to skip or include, if you change slide order or other properties, such changes apply to all Custom Audience sets.

If slides seem to disappear when you play your slideshow, see "How Come a Slide Won't Play?" in the Troubleshooting section at the end of this chapter.

ADDING SLIDE TRANSITIONS

After you've finished creating slide content, when you have everything in the order you want, you need to consider slide transitions in the context of the overall slideshow. That's where Slide Sorter view can be particularly helpful because it enables you to see more of the slideshow and to check slide transitions quickly and easily (refer to Figure 35.1).

By default, Presentations slides transition by sweeping to the right. To change, add, or remove a transition, follow these steps:

1. Choose Format, Slide Properties, Transition. Presentations displays the Transition tab of the Slide Properties dialog box (see Figure 35.3). You can also access several of these transition properties using the buttons on the property bar.
2. Choose a transition type from the Effects list. As you do, Presentations displays the transition effect in the preview box. Note the following:
   - Choosing Immediate is the same as choosing no transition.
   - Choosing Only Flash Animated Transition is important only if you plan to save the slideshow in the Flash format. Otherwise, you can use any transition in the list.

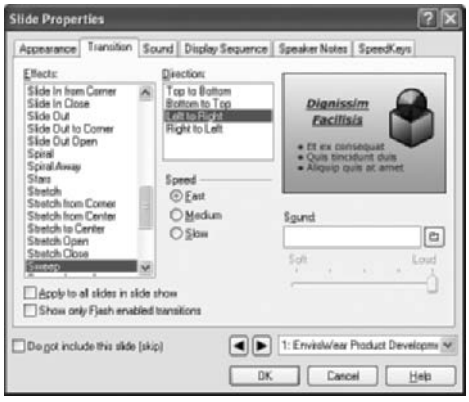

Figure 35.3
Slide transitions add a feeling of movement to your slideshow.

3. Choose the direction of the transition. Direction options vary depending on the type of transition effect you select.
4. Choose the speed of the transition.
5. Determine whether to Apply to All Slides in Slide Show, or only to the current slide.
6. Associate a sound, usually just a sound effect, to the transition if you want.
7. Choose another slide to modify, or Click OK to return to the slideshow.

TIP FROM

Read Gilgen

> Usually I find it best to select a transition I like, apply it to all slides for consistency, and then change individual slide transitions only when absolutely necessary.

Getting just the right transition is almost as much art as it is science. Although transitions can add just the right touch of professionalism, you should watch out for the following, especially in a live presentation as opposed to a self-running show:

- Transition speed should not be so slow that you find yourself waiting for the slide to advance.
- Using sound effects on slide transitions generally is not a good idea. Once in a while, for special impact, a sound effect might be appropriate.
- No transition (Immediate) can be relatively stark. While it shows a no-nonsense approach, it can also be interpreted as a lack of professional savvy.
- Subtle transitions help viewers move from the content of one slide to the next without feeling a sense of abrupt change. Sweep, roll, slide, push, and fade are among the effects that create gentle transitions.
- Dramatic transitions can add pizzazz, but they can also distract from a presentation, unless it's a self-running slideshow or a high-energy, upbeat presentation on the entertaining side. More intense transitions include burst, block, and mosaic, among others.

CHOOSING THE DISPLAY SEQUENCE

By default, Presentations slides advance manually when you click the mouse or press the spacebar. However, certain slide sequences might be easier and more effective if they advance automatically.

To change the manner in which slides advance, choose Format, Slide Properties, Display Sequence, or click the Display Sequence button on the property bar (see Figure 35.4). Then select After a Delay Of, followed by the number of seconds that should elapse before the current slide automatically moves on to the next slide.

Figure 35.4
You can control how slides and animations advance using the Display Sequence tab of the Slide Properties dialog box.

NOTE

> The method you choose for advancing to the next slide also determines how bullets and other animated objects appear on the current slide.

For a self-running slideshow, such as a memorial tribute with background music, you can use automatic timings to coordinate with the music. For example, you select a general transition time, such as five seconds, apply it to all slides, and then modify times for individual slides (for example, for rapid-fire effects or to linger on a particular slide).

NOTE

> Setting slide transitions to correlate automatically with a music background is tricky. Music always plays at the same speed, but the speed of a slideshow depends on the computer's speed, memory, and hard disk speed and whether other programs are loaded and running at the same time. If you play a slideshow on a computer other than the one on which you created it, the timings might be significantly off.
>
> The best you can do is tweak the timings on a specific computer and be sure to use that computer to play the slideshow. The extra work you need to put in to create such a slideshow usually pays off, with a satisfying and professional-looking presentation.

WORKING WITH SPEEDLINKS AND SPEEDKEYS

Most of us are used to sequential slide presentations. In fact, this can be a major barrier to using slides in a classroom setting. Most instructors like to have the flexibility of changing directions, going back to review, or branching out to different material, depending on student questions or interest.

Presentations's answer to this challenge is SpeedLinks and SpeedKeys, two methods for linking objects or keystrokes to other slides, to multimedia elements, or even to the Internet. While playing the slideshow, clicking on a linked object, or pressing a linked key automatically takes you to a particular location or performs a specified task.

➔ For more information on using SpeedLinks for multimedia elements, **see** "Using SpeedLinks to Play Sounds," **p. 816**.

To create a SpeedLink, select an object and choose Format, Object Properties, SpeedLink, or click the SpeedLink button on the toolbar. Presentations displays the SpeedLink tab of the Object Properties dialog box (see Figure 35.5).

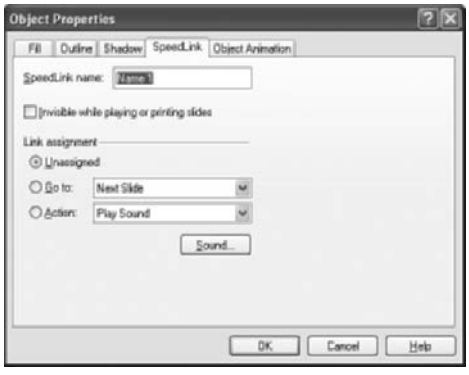

Figure 35.5
SpeedLinks enable you to go to other slides, play sounds, or start up a browser or program by clicking a linked object.

You can now choose from among the following options:

- **Go To**—Click the Go To drop-down list to select a slide from the current slideshow. Clicking the object during the slideshow automatically takes you directly to the slide, whether it's in sequence or not. You can even link to hidden (skipped) slides.
- **Action**—Click the Action drop-down list and choose from Play or Stop Sound, Browse Internet, Launch Program, or Quit Show.

NOTE

> Browsing the Internet or launching a program takes you outside of the Presentations program. To return, you must either close your browser or program, or press Alt+Tab to switch back to Presentations.

- **SpeedLink Name**—Provide a unique name so you know what this link does.

TIP FROM

Read Gilgen

> You can quickly see a list of all the SpeedLink and SpeedKeys in your slideshow, slide by slide, by choosing Tools, SpeedLink List.

- **Invisible While Playing Slides**—This option enables you to click a SpeedLink but the audience won't see the object it's linked to. For example, you could create small shapes to cover parts of an image, such as a map, each one linking to a different slide or action.

TIP FROM

Read Gilgen

> One particularly useful way to employ SpeedLinks is to create a menu-like opening slide with links to the beginning slides for the various topics of the presentation. At the end of each topic section, you can create a link that returns to the menu slide. You can also use Action Button shapes as your linked objects.

To create SpeedKeys, choose Format, Slide Properties, SpeedKeys, or click the SpeedKeys button on the property bar. Presentations displays the SpeedKeys tab of the Slide Properties dialog box (see Figure 35.6).

Figure 35.6
SpeedKeys, like SpeedLinks, enable you to go to other slides, play sounds, or start up a browser or program by pressing a defined key.

Click the key on the left that you want to define, and then associate an action with it from the options on the right, which are identical to those described earlier in this section for SpeedLinks. Note that SpeedKeys associate with a particular slide, not with an entire slideshow.

After you define SpeedKeys, while playing your show you simply press the defined key to launch the action. Of course you need to remember which keys you defined, but if you can, also review the SpeedLink and SpeedKey definitions for a slide by choosing Tools, SpeedLinks List.

➔ For more information on using SpeedKeys for multimedia elements, **see** "Using SpeedKeys to Play Sounds," **p. 818**.

In short, you don't have to feel that you're locked into a sequential presentation. Use SpeedLinks and SpeedKeys to jump around and branch out as needed.

ADDING OBJECT ANIMATION

The word *animation* probably conjures up visions of Mickey Mouse or Woody Woodpecker. In cartoon animations, a sequence of still pictures shown rapidly gives the illusion of motion.

In Presentations, animations also create the sense of motion. Fortunately, however, you don't have to create a sequence of still pictures to get this effect. You simply tell Presentations how an object is supposed to move and Presentations takes care of the details.

Before we go much further, let's get something clear: Animations can be great fun, but they can also be annoyingly distracting. While there can be a place for gratuitous animation, there's even more use for properly applied animations. For example, an animation that adds a slowly moving arrow from Wisconsin to California to illustrate a gradual shift in milk production dominance can help audience members understand and remember what they see.

NOTE

> Talking about animations in a static medium just doesn't work very well. If you want to see and understand the full effect of animations, I suggest that you start Presentations and try out the things we talk about.

ANIMATING BULLETS

The first and most obvious animation movement you see on a Presentations screen is animated bullets. By default, Presentations's bullets enter one at a time, from the right side, as you click the mouse or press the spacebar.

To change how bullets appear, first select a bulleted list box; then choose Format, Object Properties, Object Animation, or click the Object Animation button on the toolbar. Presentations displays the Bullet Animation tab of the Bulleted List Properties dialog box (see Figure 35.7).

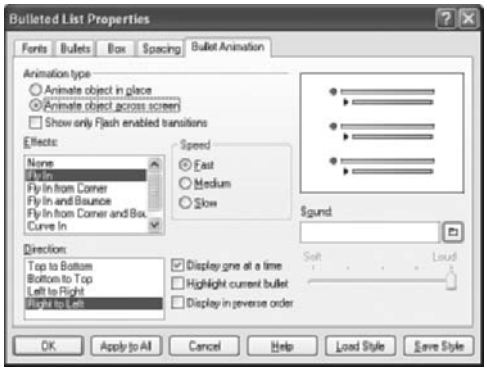

Figure 35.7
Bullet animations can help you pace your presentation, one bullet at a time.

You can choose from among the following options:

- **Animation Type**—Bullets can appear in place (for example, fade or dissolve), or across the screen (for example, fly or bounce in). You need choose Flash Enabled Transitions only if you plan to export your slideshow in Flash format.
- **Speed**—Choose a speed in keeping with the pace of the presentation, but that doesn't slow you down.
- **Direction**—The types of directions depend on the animation type you select. You can preview the effect in the preview box.
- **Display One at a Time**—Unless you want the entire bulleted list to appear at once, be sure to check this box. On the other hand, if you're moving quickly through this slide, you may not have time to animate each bullet separately.
- **Highlight Current Bullet**—This option dims already viewed bullet items as you move on to the next bullet.
- **Display in Reverse Order**—Use this option if you want to build to a climax, for example, while announcing a list of winners.
- **Sound**—Attach a sound effect if you want to emphasize bullets as they appear. Be careful, however, that sounds don't distract from the presentation.

Animating Other Objects

Animation can also be effective when used with individual slide objects such as graphics or text boxes. For example, you might consider not using bullets at all, but using objects and text boxes to communicate ideas, steps, or concepts sequentially (see Figure 35.8).

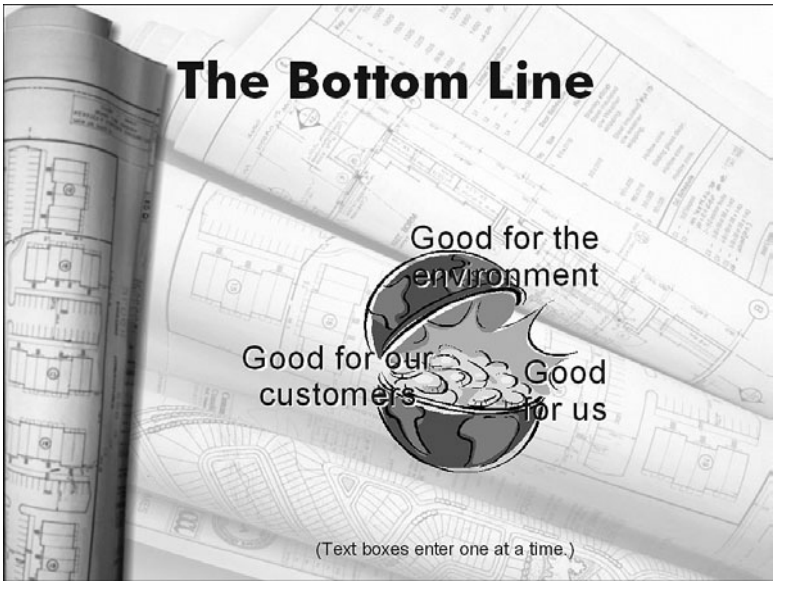

Figure 35.8
Animated images and text boxes can be an excellent alternative to bulleted lists.

To animate an individual Presentations object, follow these steps:

1. Select the object.

2. Choose Format, Object Properties, Object Animation, or click the Object Animation button on the toolbar. Presentations displays the Object Properties dialog box (see Figure 35.9).

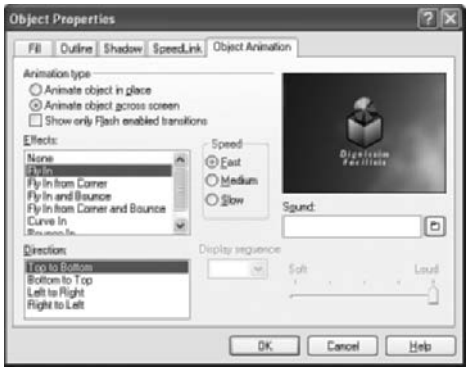

Figure 35.9
Animations enable you to control how and when objects appear on the screen.

3. Choose from among the various animation options, which are essentially the same as those available for bullet animations.
4. If you have more than one animated object on the screen, you can change the order in which the object appears by choosing the Display Sequence from the drop-down list.

COORDINATING ANIMATIONS AND TRANSITIONS

Making animations work together in the proper sequence can be a bit tricky. For example, by default all bullet items have to appear *before* any other animated objects appear. In the Display Sequence tab of the Slide Properties dialog box, you can change that order by choosing to display animated objects before the bulleted list.

Further, if you have chosen an automatic timing for advancing the current slide to the next, Presentations normally uses the same timing to automatically advance each animated object (for example, five seconds between each object).

You can choose to have all animated objects appear quickly after the slide begins, followed by a manual or timed automatic advancing of the slide.

TIP FROM

Read Gilgen

To get the exact kind of animations you need, you might have to outsmart Presentations and create slide sequences that *appear* to have animations that normally aren't possible.

For example, if you want graphic images to appear between bullet animations, you can create the completed slide first, make several copies of it, and then modify the slides by removing objects or bullets (slide 5 has everything, remove the last bullet from slide 4,

continues

and so on). As you advance the slides, the audience doesn't know that you're moving from one slide to another. Instead, it simply appears that objects are being added to a single slide.

CREATING SPEAKER NOTES

One final preparatory change you are likely to make is one your audience may never see. Speaker notes are just what their name implies—notes you make to yourself to help remind you of important things to say or do, or details that are too hard to memorize.

To create speaker notes, follow these steps:

1. Choose Format, Slide Properties, Speaker Notes, or click the Speaker Notes button on the property bar. Presentations display the Speaker Notes tab of the Slide Properties dialog box (see Figure 35.10).

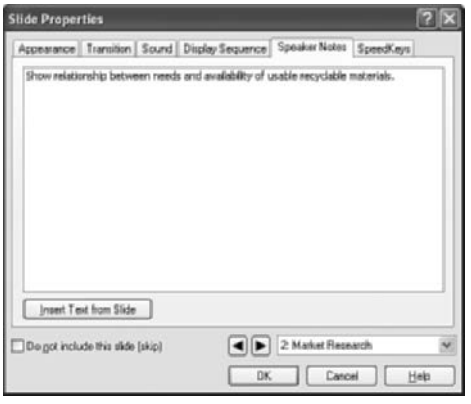

Figure 35.10
Speaker notes can be used to help you remember what to say, or as notes on handouts.

2. If you want to include text from the current slide, click Insert Text from Slide.
3. Type any notes you want to include. You can cut, paste, and use keystroke methods for bold (Ctrl+B) or italics (Ctrl+I).
4. Click OK to return to Presentations, or choose another slide from the slide list and repeat steps 2 and 3.

Speaker notes don't necessarily have to be limited to your own use. If you want to create brief explanations or added details about a slide, you can print handouts that include a thumbnail view of the slide along with speaker notes. These can often be more valuable than slides printed out as handouts.

NOTE

> If you want to use speaker notes, you have to print them. You cannot view speaker notes while playing your slideshow.

PREPARING TO MAKE A PRESENTATION

The slides are finished. The slideshow's done. Now you have to get yourself ready to make the presentation.

Remember that Presentations is only a tool to help *you* make *your* presentation. Unless you're playing a self-running show, you and the way you interact with your slideshow ultimately determine how successful the presentation will be.

Be sure to spend plenty of time rehearsing your presentation. You especially want to know at what points in your presentation you advance a slide or animation, and where there are SpeedLinks or SpeedKeys and how will you use them. You also want to know enough about your presentation venue to know if you can move around so you don't appear to be anchored to a podium or laptop (for example, if you can you use a remote-controlled mouse to advance slides).

Even veteran presenters encounter problems. However, the more you can anticipate in terms of preparation, the more likely your presentation will appear to be smooth and natural. If presenting using a slideshow is something new for you, take time to talk to others who are more experienced to learn some of the traps you want to avoid. For example, make sure your equipment works, including laptop, projector, and sound system. If you can, do a run-through with your equipment. And *always* have a backup plan in case of equipment or power failure where you lose the ability to use your slideshow. For example, I always make overhead transparencies of key slides, just in case.

Are you scared yet? Good. Preparation will take care of that. Now, on to the nuts and bolts of making a presentation.

PLAYING A SLIDESHOW

Playing a Presentations slideshow is really quite simple. Use one of these options:

- Go to the first slide of your show and click the QuickPlay tab at the right side of the screen.
- Click the Play Show button on the toolbar. This starts the show at the first slide.
- [Choose View, Play Slide Show, or click the Play Slide Show button on the property bar. Presentations displays the Play Slide Show dialog box (see Figure 35.11). Choose the first slide and click Play.

Figure 35.11
The Play Slide Show dialog box helps you set up how you want your show to play.

After you start the slideshow, you can use these options:

- To advance a slide, click with the mouse, or press the spacebar, press the right or down arrow keys, or press PgDn.
- To go back a slide, press the left or up arrow keys, or press PgUp.
- To jump to a specific slide, press Ctrl+G. Use the Go to Slide dialog box (see Figure 35.12) to choose the target slide.

Figure 35.12
The Go to Slide dialog box helps you go directly to any slide, even out of sequence.

- To use the highlighter, just click and drag the mouse to draw on the screen. To erase the highlighter, press Ctrl+E.
- To stop or exit the slideshow, continue to the end of the show, or simply press Esc.
- If you're using sound, you can increase or decrease volume using the + or - keys, stop the sound by pressing End, or restart the sound by pressing Home.

Although you should become familiar with all of these options, if you forget you can always right-click the screen and choose from the QuickMenu (see Figure 35.13).

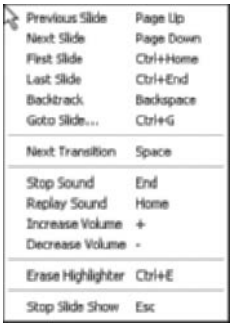

Figure 35.13
Use the QuickMenu if you forget slideshow keystroke controls.

TIP FROM

Read Gilgen

Although you can always use the QuickMenu to control your slideshow, you can appear much more natural and professional if you master the use of Presentations's keystroke controls.

The Play Slide Show dialog box (refer to Figure 35.11) provides you with several useful options before you begin your show, including the following:

- **Beginning Slide**—If you don't want to start at the beginning, select the slide you do want to begin with.
- **Audience**—If you have created custom audiences, select the one you want from the drop-down list.
- **Create QuickShow**—With today's faster, multimedia-capable computers, this option isn't usually necessary. But if you have an older, slower, or limited-memory computer, Presentations can create a slimmed-down version of the slideshow that plays more quickly. Essentially, it downsizes graphic images and preloads as much of each slide as it can before you actually need it.
- **Repeat Slide Show**—This is how you set up a self-running slideshow. Make sure that all slides are set to advance automatically; then choose this option to have the show repeat over and over again until you press Esc.
- **Highlighter Color and Width**—Use these options to change the color and width of the highlighter pen you can use to draw on the screen while playing the slideshow.

PRINTING HANDOUTS

Part of your presentation may include providing audience members with printed materials. If you do, however, make sure it's for an appropriate purpose. One of my pet peeves is being given a sheaf of full-page printouts of a slideshow before the presentation begins. Instead, I'd rather have a printout with thumbnails of a half dozen slides along with room for audience notes, or with audience-oriented speaker notes.

Work smart! Save paper by reducing the amount of printed material you produce for your presentations!

➔ For more information on using Presentations's printing features, **see** "Printing Slides," **p. 763**.

USING SHOW ON THE GO

What computer are you going to use to present your Presentations slideshow? Although this seems elementary, remember that not all computers are configured the way yours is. In fact, although Microsoft PowerPoint can be found on most computers, Corel Presentations probably is not.

If you have your own laptop, you're lucky. This is the best way to ensure that your presentation will work as you designed it, especially if you incorporate multimedia elements.

If you must use someone else's computer, you have to determine ahead of time whether Corel Presentations is installed on the computer. If not, Presentations provides a useful alternative: Show on the Go.

Show on the Go creates a self-contained slideshow that does not require Corel Presentations. It bundles everything together, including slides, sounds, and even movies, so that you take just one executable file with you to play on another computer. You can also send the resulting executable files to a colleague who doesn't use Corel Presentations.

To use Show on the Go, follow these steps:

1. Prepare your slideshow completely, so that it's ready to present, including transitions, timings, custom audience, and highlighter options.
2. Save the show with the filename you want to use for the Show on the Go.
3. Choose File, Show on the Go, or click the Show on the Go button on the property bar. Presentations displays the Show on the Go dialog box (see Figure 35.14), which steps you through the process of creating a Show on the Go.

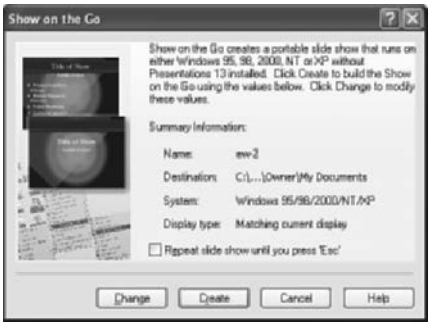

Figure 35.14
Create a Show on the Go file if you need to play your show on a computer that doesn't have Corel Presentations installed.

4. Click Change to modify the default destination settings. Generally, you save the resulting Show on the Go file to your hard drive. If you want to burn the show to a CD, create it first on your hard drive and burn it later. You can even choose to create the Show on the Go and attach it to an e-mail message to send to someone else.
5. Click Next to change the default screen type. Although most computer projectors display at XGA resolution (1024 × 768), not all do. To be safe, choose Any Windows Display. If you know that the computer and projector you'll use match exactly your current screen resolution, choose the second option. This may provide a crisper looking presentation.

TIP FROM

Read Gilgen

When I use Show on the Go, I create two versions, one for any Windows display, and one to match my current screen resolution. Then when I'm practicing on the actual presentation computer, I can decide which looks best.

6. Click Finish to return to the main dialog box.
7. Click Create to generate the Show on the Go file, which is an .exe file by the same name as the saved slideshow, for example, envirowear.exe.

To play a Show on the Go file, from Windows choose Start, Run, Browse to find the show's .exe file, and click OK. The show begins at the first slide. You can use all of Presentations's slide controls to play it, and Esc to end it.

If your Show on the Go text looks lousy, see "I've Got the Jaggies!" in the Troubleshooting section at the end of this chapter.

TROUBLESHOOTING

HOW COME A SLIDE WON'T PLAY?

When I play my slideshow, one slide won't play, but it's clearly there in my Slide Sorter view.

Presentations doesn't give a very clear indicator when slides are skipped, or hidden. If you click the drop-down list of slides at the lower-right corner, and if [Skip] appears before the slide title, there's your answer. Go to that slide and you'll note also that the Skip Slide button on the property bar looks like it is selected. Click that button to clear the Skip slide option. Your slide should now appear when you play the slideshow.

I'VE GOT THE JAGGIES!

I need to use Show on the Go, but the resulting slideshow's text looks lousy.

If you use the default Any Windows Display option when creating your Show on the Go, Presentations generates text to match the lowest common denominator. Although this is safest, it's not usually the best.

Instead, choose Windows Displays Matching Current Setup to generate the best resolution.

If you're not sure, generate both, and use the best one when you get to the computer you'll be using.

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CHAPTER 36

Publishing to the Web

In this chapter

by Read Gilgen

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Understanding Web Documents

In Chapter 21, "Using Experts and Macros," you learned how to prepare and publish WordPerfect documents to the Web. With very little effort, you can also publish Presentations slideshows to the Web. Presentations provides an Internet Publisher Expert that asks you how you want to present your show and creates the appropriate files for you.

Considerations in Publishing Documents to the Web

Although the process of publishing to HTML may be made simple in Presentations, you should consider the following:

- **Web Page Format**—Presentations provides two powerful, yet significantly different methods for publishing documents to the Web. One is HTML aided by the use of Cascading Style Sheets, the result of which is shown in Figure 36.1. The other is PDF, the Portable Document Format developed by Adobe Corporation, shown in Figure 36.2. Both types can be viewed in any browser, but PDF slideshows do require the use of a special reader or browser plug-in. Fortunately, nearly everyone has this free reader already installed. You have to determine which format and which method of viewing the slideshow works best for you.

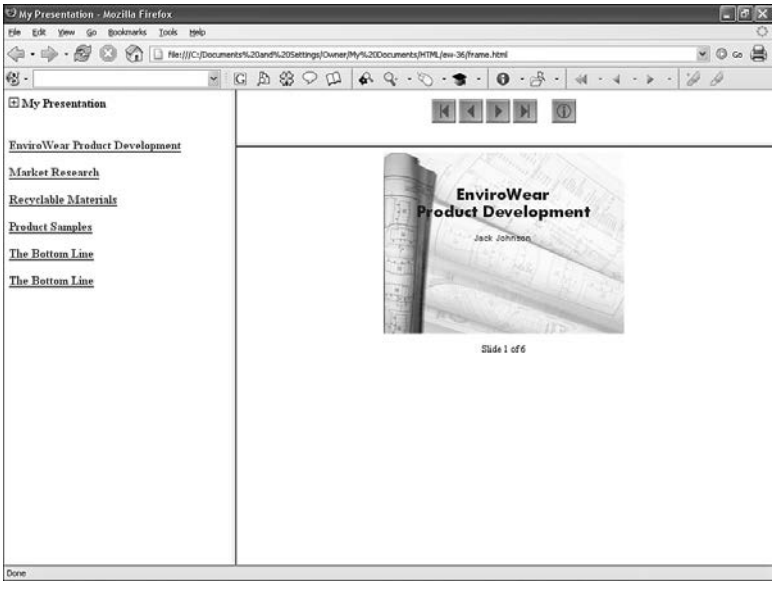

Figure 36.1
Presentations makes it easy to prepare a group of HTML files to present your slideshow on a Web site.

- **Browsers**—You'll want to make sure that your published slideshows can be viewed on all browsers, if possible. Since major browsers are free to download, you can expect that those viewing your slideshow have a relatively recent version of the browser, which supports CSS, or Cascading Style Sheets, Presentations's method for presenting slides on the Web.

Figure 36.2
Presentations also allows you to publish your slideshow for the Web or for standalone applications in the popular PDF format.

NOTE

> Browser compatibility is one major area where Presentations has a large advantage over PowerPoint. PowerPoint shows tend to work best in Internet Explorer. Presentations shows, on the other hand, display equally well in all major browsers.

- **Platform**—You need to test your pages on various platforms (for example, Windows, Macintosh, or Unix systems) to make sure everyone can see them properly.
- **Screen resolution**— You want to be sure it's easy for readers to view your slideshow regardless of the screen resolution they're using. The minimum these days seems to be Super VGA (SVGA, or 800 × 600).
- **Fonts**—Unless users have the same fonts on their computers as you do on yours, text fonts may change. Unless a particular font is important, stick with basic fonts, such as Arial or Times Roman.
- **Plug-ins**—A plug-in is an addition to a Web browser that adds functionality, such as the capability to display animations or video, play sound, or read certain non-HTML information. If your audience is not very computer literate, requiring viewers to download and install plug-ins might not be worth the trouble.

UNDERSTANDING WEB-BASED PRESENTATIONS

Now that you know you can do it, you really need to ask yourself why you want to put your slideshow on the Web. Indeed, the purposes for a Web-based presentation may be quite different from those for a face-to-face presentation. There are several good reasons for publishing your slideshow to the Web, and probably a few bad ones as well:

- **Minimize Handouts**—Help save a tree! Instead of creating tons of paper handouts, provide audience members with a URL and invite them to view the slides online. If they really want to print them, they can.
- **Update the Slideshow**—As you present, you may discover things you'd like to change. Let audience members know you'll add those things, and they can access the updated slides online.
- **Expand the slideshow**—You can allow audience members to view speaker notes online. You can also add descriptive information that might not be appropriate for an in-person presentation.
- **Preview the slideshow**—You might ask audience members to preview the slides, in preparation for a discussion. Students might print the slides and use them as an outline to which they add class notes.
- **Replace the Presenter**—Let's hope this is a bad example. If the slideshow is better than your presentation, you'd probably better get some help in improving your presentation skills.

Modifying a Presentation for the Web

Before you publish a slideshow to the Web, which in and of itself is quite simple, you first need to consider whether the presentation needs modifications to make it more usable in a self-instructional setting. Because you won't be there to guide, direct, or answer questions, you have to put more of those elements into the slideshow itself. In fact, Web-based and live slideshows really are two very different kinds of presentations. You don't just simply "put a slideshow on the Web"—at least not if you expect it to be effective.

Three key differences between audience-based and Web-based presentations have to do with explanation, navigation, and fancy features, as described in the following sections.

Adding Explanations

Having lots of text in a live slideshow is counter-productive because it requires too much fast reading and because you are there to fill in the details. On a Web page, however, viewers have more time, are closer to the screen, and can read larger amounts of text more easily. They also need the additional information you would provide verbally in a live presentation.

You might find that you need to add slides here and there with full pages of narrative; for example, you might need to create links from bullet points to pages that develop or amplify the topic. Or you might need to add narrative to slides that are dominated by visual images (see Figures 36.3 and 36.4).

In short, you need to consider what the viewer is missing by not having you there and what kind of textual information is required for the slideshow to make sense.

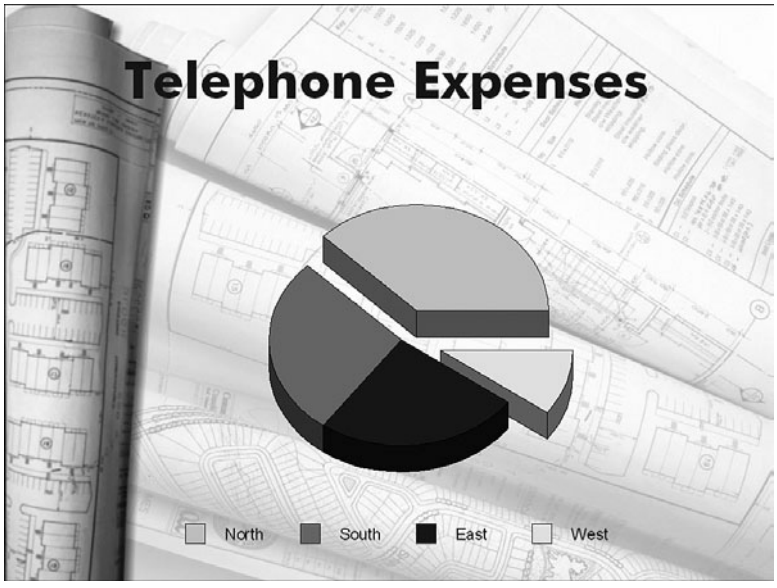

Figure 36.3
This pie chart works for a live presentation because you're there to explain it.

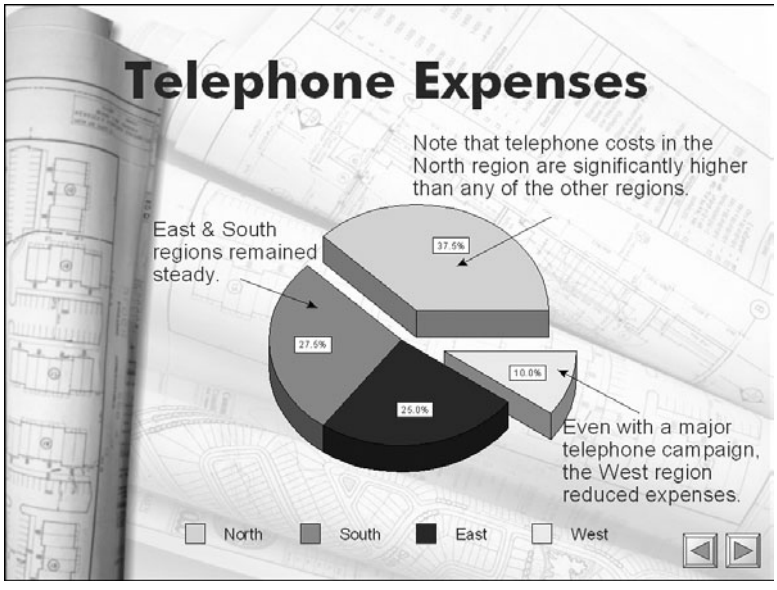

Figure 36.4
For a Web-based presentation, you should add textual explanations to slides where graphics alone don't communicate the whole message.

Providing Navigation

When you make a presentation, you're in control of which slides you show and in which order. Even if the Web version of a slideshow is intended to be strictly sequential, you need navigation tools to help viewers make it through the presentation. At a minimum, you should make sure the slides contain something the viewer can click to advance or back up in the slideshow (refer to Figure 36.4).

If a slideshow is not sequential, but modular (the viewer can jump to various sections, nonsequentially), you should provide even more navigational assistance. For example, you could create a table of contents or menu slide toward the beginning of the slideshow, with obvious, Web-type links to the various "chapters" or sections of the show (see Figure 36.5). Throughout the slideshow, you could add action buttons or links that return the viewer to the main menu.

Figure 36.5
A menu slide, with links, can help viewers navigate a nonsequential slideshow.

NOTE

You cannot add links a bulleted list or to text within the list. Instead, you must use text boxes and create links to the entire text box. You might add underlining to the text in such boxes to make it clear they are links, or add linked action buttons next to the text.

TIP FROM

Read Gilgen

Although you cannot add links to text in bulleted list boxes, you can use shapes that cover the text area you want to link, link the shape, and make the shape invisible while playing the slideshow. It then *appears* that clicking the text takes you to another location, although it's really the linked shape that does so.

Basically, you have to think of a slideshow as a Web page. What do you expect when you visit a Web page? Would you find it difficult to navigate your own slideshow? You should add the tools viewers need to successfully view and benefit from your presentation.

Reducing Fancy Features

You need to keep in mind that when you're in control, you can use or skip the pizzazz, and you can get people back on track if they get distracted. You have no such control on the Web, and what might be interesting for one person might turn off another person. Further,

fancy animations or multimedia elements might not work on many browsers, so if you depend on animations, sounds, or video to convey information or meaning in a live presentation, you need to find other ways of accomplishing this on the Web. Video and audio clips are particularly troublesome on the Web. Some viewers see them perfectly, and others don't even know they're there.

On the other hand, if one of your fancy elements really is important, go ahead and use it, but provide an alternative in case it doesn't work for everyone. For example, say you want viewers to hear Martin Luther King, Jr.'s "I have a dream" speech. You could place a graphic photo of Dr. King, with an action setting to play the sound clip, and also a link beneath the picture that takes the viewers to a page that shows the printed speech (see Figure 36.6).

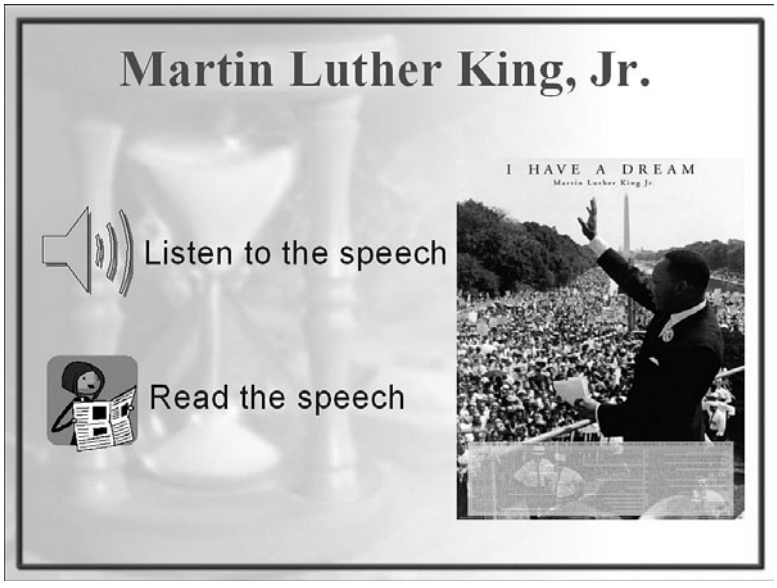

Figure 36.6
You should consider providing alternative ways for viewers to access information when multimedia elements alone might not work.

WORKING WITH HYPERLINKS

In Chapter 35, "Preparing and Presenting a Slideshow," you learned that you can create Web page–like links. Many of these links are invisible to the audience, which is appropriate for a live presentation. However, visible hyperlinks have a distinct advantage in Web-based presentations because viewers are conditioned to click such links.

You should also be aware that creating hyperlinks intended for a Web presentation can present these difficulties:

- If you create links to files on your local computer, those links might not work when you move the presentation to a Web server. It's safer to use links only to Web pages or to graphic or multimedia files found in the same folder as the presentation. They can then be transferred to the Web server along with the presentation.

- If you create a link to another location entirely—for example, to another Web site—viewers might not know how to return to your slideshow, and thus you lose them after they click the link. One way to help is to place information near the link: "Clicking this link takes you to another Web site. Click your browser's Back button to return to this presentation

SAVING A PRESENTATION AS A WEB PAGE

Presentations's Internet Publisher feature makes it a snap to publish a slideshow for the Web. To do so, first revise and save your slideshow to make it more suited to a Web format, as described in the preceding sections. Then choose File, Internet Publisher, or click the Publish to HTML button on the toolbar. Presentations displays the Internet Publisher dialog box (see Figure 36.7).

Figure 36.7
Use the Internet Publisher expert to prepare a slideshow for the Web.

NOTE

> Each time you use the Internet Publisher, Presentations remembers the settings you choose. Thus, if you have used Internet Publisher before, you can modify only those options that need changing. If you know that the settings reflect what you want, you don't need to go through each step.
>
> At any point you can click Finish to publish the slideshow using current settings.

Presentations lists various options in the left column, and you can click Next to step through the options, or click directly on an option to go to the screen for changing it.

TIP FROM

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> We can explain how the Internet Publisher works, but you need to experiment with options and formats until you find what works well for you. Just open the Internet Publisher, make a change, click Finish to publish, replacing what you may have published previously, and open the Web show in your browser.

Internet Publisher options include the following:

- **Layout**—This refers to the general arrangement of slideshow elements on the Web page. For example, from the Layout screen of the Internet Publisher, click Frame Enhanced Page, then click View Layout. Presentations displays a list of details associated with that layout (see Figure 36.8). You can customize any predefined layout, or simply start by choosing Create a New Layout.

Figure 36.8
You can customize the details of any Web layout.

- **Graphic Type**—Choose the graphic format that best suits your needs (see Figure 36.9, and click each graphic type for a brief description). All browsers can view GIF and JPG formats, and most recent versions of browsers can view PNG files. JPG are usually better for complex, photographic type images. You can use GIF or PNG files equally well, although older browsers might not be able to view PNG files.

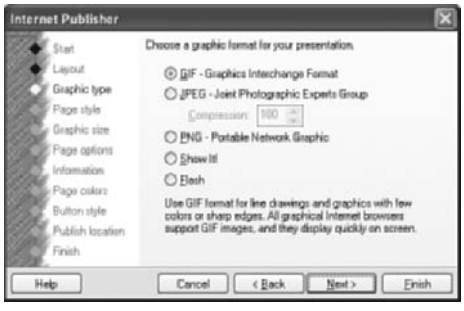

Figure 36.9
Presentations can use three graphic types equally well in Web-based slideshows.

Two options for making a more complete presentation to the Web are Show It!, Presentations's own method for making animations, transitions, and even sounds work in a Web setting. Unfortunately, this option only works with later versions of Internet Explorer, only version 4.7 of Netscape, and not at all with other browsers. If you try to

play a Show It! version, and if you're using Internet Explorer, your browser will automatically install the Show It! plug-in if you allow it.

CAUTION

> If you do use Corel's Show It! option, you'll need to alert your viewers that they can view the show only with Internet Explorer. You might also need to provide two versions, one for Show It! and Internet Explorer, and one for other browsers.

Flash is a more widely known standard for presenting animations and transitions on the Web. Although this too requires a plug-in from Macromedia, you can view Flash-based Web presentations in any browser. You retain transitions and animations, but lose sounds.

- **Page Styles**—Click each page layout style (see Figure 36.10) to see what each does. The Frame layout is, perhaps, the best choice for easy navigation.

Figure 36.10
Choose a Page Layout if you haven't already done so.

- **Graphic Size**—The options and combinations available in the Graphic Size screen (see Figure 36.11) are complexly interrelated. Display size refers to the assumed display resolution your viewers will use. 800 × 600 is a safe bet, but most newer computers can handle 1024 × 768.

Figure 36.11
Choosing just the right screen size can be tricky since you want to make the slideshow look good for the majority of your viewers.

Width of Graphics refers to how much of the selected screen is taken up with the slide picture itself. You'll want to experiment until you find a slide size you're comfortable with. The default 1/2 of Screen Size usually works well.

- **Page Options**—Page options include various check boxes (see Figure 36.12). Click each to see the effect on the preview page. These include the Title of each slide, page number, speaker notes, a navigation bar, and a text or graphic outline of slides in the show.

Figure 36.12
Since Web-based slideshows need more textual explanation, using speaker notes can be very useful.

TIP FROM

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Displaying Speaker Notes in a Web-based presentation can be very useful in providing information you normally present verbally, without having to rework the slide itself.

- **Information**—You can include information about yourself (see Figure 36.13), such as e-mail or personal home page, or other information related to the slideshow, for example, "Presented at the EnviroWear Corporate Training Seminar, October 31, 2006." You can also provide a link to the original Presentations show.

Figure 36.13
Additional information can help viewers know the source of the slideshow and how to get more information.

CAUTION

If you make your Presentations slideshow available for download, you run the risk of having it modified while still being attributed to you. If you're not sure of the audience, you might consider making the slideshow available only in HTML or PDF format.

- **Page Colors**—You can modify the default background and link colors that viewers will see in their browsers. However, do this only if absolutely necessary, or it might be more confusing than helpful.
- **Button Style**—Choose a button style and color that works well with the overall layout and design of your slideshow.
- **Publish Location**—By default, Presentations places the generated Web page files in My Documents/HTML/ in a folder with the same name as your saved slideshow. It doesn't matter where you save the files, so long as they're in the same location so it is easier to transfer them to your Web server.

  Click Advanced if you want to change the default filename extension to .htm (from .html), or if you want to place graphic images in the same folder as your other Web pages (instead of in a separate folder) (see Figure 36.14).

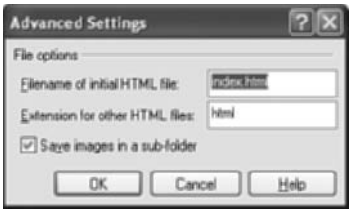

Figure 36.14
Matching your files and folders to work well with a Web server is important if you don't want broken links or pages not available.

Before publishing your slideshow, you can return to any of the preceding steps to make final changes.

Finally, click Finish to publish your show. If this is a new show, Presentations asks if you want to create the target folder. If you're republishing a show, Presentations asks if you want to replace existing files. In either case, answer Yes. If you have created a custom layout, Presentations also asks if you want to save the layout for future use. Provide a name and click Save, or click Don't Save.

Presentations generates the various Web page files and then asks if you want to view it in your browser. Click Yes to display it in your browser.

TIP FROM

Read Gilgen

Unlike Windows, many Web servers are picky about the use of uppercase or lowercase filenames. If you try to open WebPage.htm in your browser by typing `webpage.htm`, your browser might tell you that the file can't be found. To save yourself a lot of grief, you should always use lowercase filenames when saving PowerPoint presentations as Web pages.

NOTE

Presentations doesn't always open your browser as advertised. If it doesn't seem to work, open your browser; click File, Open; browse to the location of your slideshow; select index.html; and click Open.

USING THE PDF FORMAT FOR WEB-BASED SLIDESHOWS

If you think publishing to HTML is easy (and it is!), just try publishing your slideshow to PDF (Adobe's Portable Document Format). Except for playing your show in Presentations itself, this option is the closet you come to playing a full-screen slideshow.

To create a PDF version of your slideshow, simply choose File, Publish to PDF, or click the Publish to PDF button on the toolbar. Presentations displays the Publish to PDF dialog box (see Figure 36.15).

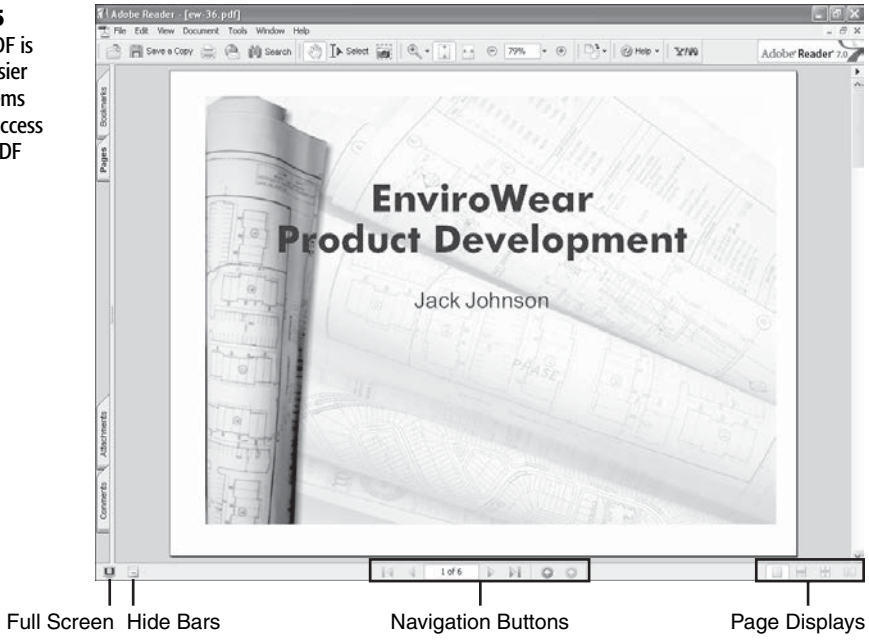

Figure 36.15
Publishing to PDF is simple, even easier than what it seems like when you access the Publish to PDF dialog box.

Although the options appear complicated, they really aren't. Generally, you can provide a filename, accept the remaining default settings, and click OK.

CAUTION

> Presentations does not automatically use the name of your slideshow for the PDF filename. If you forget to supply a name, Presentations simply names the file ".pdf".

To check the PDF file, open the Adobe Acrobat Reader; choose File, Open; browse to the file; and open it. Adobe Acrobat Reader displays the file as shown in Figure 36.16. Note that the image is faithful to the original slideshow, and along the bottom are navigation buttons and screen layout options, including a full-screen, slideshow-like option where slides advance as you click the screen.

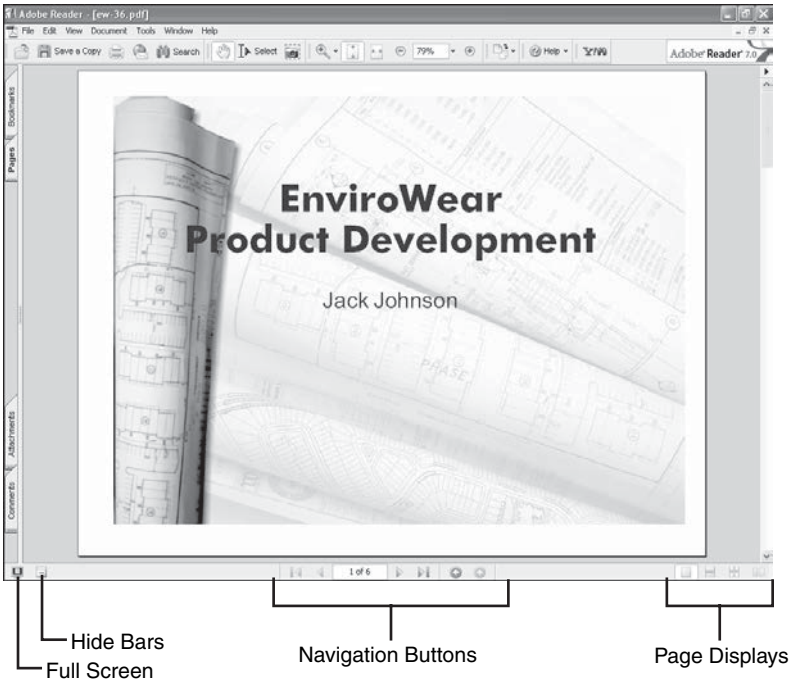

Figure 36.16
Displaying a slideshow in PDF format is an easy way to get a faithful representation of your slides, except for animations.

So what are the downsides? None, really. Users must install Adobe Acrobat Reader, but the reader is free from Macromedia (`http://www.macromedia.com`), and it automatically installs itself as part of your Web browsers so that if you open a PDF file from a Web server, Acrobat Reader automatically takes over within the browser.

Most users already have Acrobat Reader installed. If they don't, they should for other pages they'll visit on the Web. You'll just be doing them a service by nudging them to get the free reader.

If the fonts you used in your slideshow don't display correctly in your Web-based slideshow, see "Why Do My Fonts Look Screwy?" in the Troubleshooting section at the end of this chapter.

TRANSFERRING FILES TO A WEB SERVER

Creating or publishing a Web version of your presentation is only the first step in making it available to the world via the Web. The second step involves transferring your Web page files to a Web server. Then, when someone wants to view your Web page, he or she contacts that Web server, which "serves" your Web pages so he or she can view them in a browser.

The precise details of transferring files to a Web server are beyond the scope of this book. However, here are a few things you need to consider:

- Contact your network administrator or technical support person early on in the process to determine whether you have access to a Web server. If your company or school has such a server, this person can show you exactly what to do.

If you're lucky, you might be able to publish your documents directly to a local or network drive. Many corporate intranets, for example, permit you to save documents directly on network drives that are accessible with a browser. Your Webmaster can tell you where to save your files and whether you need special access rights to such locations.

If you transfer your files to a remote computer, you often do so using FTP, or File Transfer Protocol. This process involves establishing a connection over the network or by modem to the remote computer and then using FTP software to transfer the files. Your Webmaster can provide you with the necessary login and password information, as well as details as to where to save your files.

NOTE

> Because all access to a remote server involves some security risk, Webmasters often establish security procedures that can complicate a simple FTP transfer. Consider this a necessary inconvenience that ensures the future integrity of your server and your documents.

- The first couple of times, getting pages to the Web server can take some time, so allow plenty of time to learn the process. After a while, you get more comfortable with the procedures and you can transfer your Web pages in a matter of seconds.
- If you use the typical HTML-formatted page, don't forget that you must also transfer all the supporting files. Further, the same file relationship (main file with subfolders of supporting files) must also be established on the Web server.
- After you transfer your files, be sure to thoroughly test the slideshow to make sure everything works as you expect it to. Check to make sure that graphic images, fonts, and links are all there and working properly.
- If you want a wide audience to view your presentation on the Web, you need to test it using as many browsers and computers as possible. For example, besides using Internet Explorer on a PC running Windows XP at XGA resolution, you should try it using Windows 98 or SVGA resolution, with Netscape or Firefox. Or for real fun, you could give it a whirl on a Macintosh using Netscape or Safari. That way you can determine whether to leave the slideshow as is or modify it so more people can view it.

If certain pages seem to disappear when you play your slideshow on the Web, see "Where Are My Web Pages?" in the Troubleshooting section at the end of this chapter.

If graphic images appear to be replaced by a broken picture icon, see "Where Are My Graphic Images?" in the Troubleshooting section at the end of this chapter.

Troubleshooting

Why Do My Fonts Look Screwy?

When I play my slideshow on the Web, the fonts I use look fine on my computer, but not on other computers.

For fonts to display correctly, the computer playing the slideshow from the Web must also have those same fonts installed. For example, Arial and Times New Roman will always display correctly, but Monotype Corsiva might not.

To ensure that fonts display properly, use generic fonts or consider publishing to PDF where you can specify that fonts should be included as part of the published PDF document. Although this increases the size of the resulting PDF document, it does guarantee that fonts will appear as you intended them to.

Where Are My Web Pages?

On my own computer, I can clearly see all of the pages of my slideshow, but when I move the slideshow to the Web server, some pages appear to be missing.

Although Presentations pretty much automatically takes care of naming Web pages for you, if you rename a page using mixed upper- and lowercase (for example, YearEndReport.htm), links to such a page use only lowercase will work when you view the page from your local computer. However, Web servers are rather picky about this, and consider YearEndReport.htm and yearendreport.htm two different files. Check the case of your filenames to make sure they all match.

You should, of course, also check to make sure all files were properly transferred to the Web server, and that on the Web server they are in the same location relative to the main page that they are on your computer.

Where Are My Graphic Images?

On my own computer, I can clearly see all of my graphic images, but when I play the Web version, all I see are broken image icons.

This is a common problem, which happens when you transfer files to the Web server. Make sure your graphic images get transferred, along with Web pages, and make sure they're located in the proper folders relative to the main page.

Another, less common problem, is that certain nonstandard images may require that the server be set up to serve such images. JPG and GIF are always supported, but PNG or other image types might not be. Contact your Webmaster if you need help displaying nonstandard images.

CHAPTER W1

Customizing Graphic Shapes and Images

In this chapter

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MAKING WORDPERFECT TEXT WORK WITH GRAPHIC OBJECTS

Graphic elements such as clip art, lines, or watermarks can do wonders to spice up an otherwise mundane document. However, the core of the document is still the text. Getting text and graphics to coexist in your document requires some skill and a lot of patience. Not only must you find room for your graphic images, but you also have to make sure the text is readable and that the graphics support rather than overwhelm what you're trying to say. In addition to what you learn here, trial-and-error also will be your teacher.

CAUTION

Using graphics, especially on computers that have limited memory (that is, RAM), increases the chances of program crashes. Save your work frequently while working with graphics to avoid losing painstaking work.

NOTE

All graphic images used in this chapter can be found in the Scrapbook or on the WordPerfect Office CD-ROM, Disc 2, unless otherwise noted.

WRAP OPTIONS

When you insert a graphic image in your document, you insert a rectangular graphics box that contains the image. How the body of your text interacts with the graphics box, or with the image it contains, depends on the *wrap* method you choose.

By default, WordPerfect wraps text on both sides of a graphics box rectangle. To see other wrap options, right-click the graphics box and choose Wrap from the QuickMenu (see Figure W1.1).

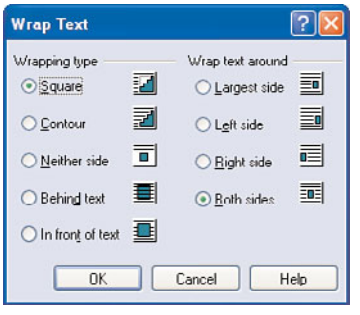

Figure W1.1
You can choose wrap options from the Wrap Text dialog box.

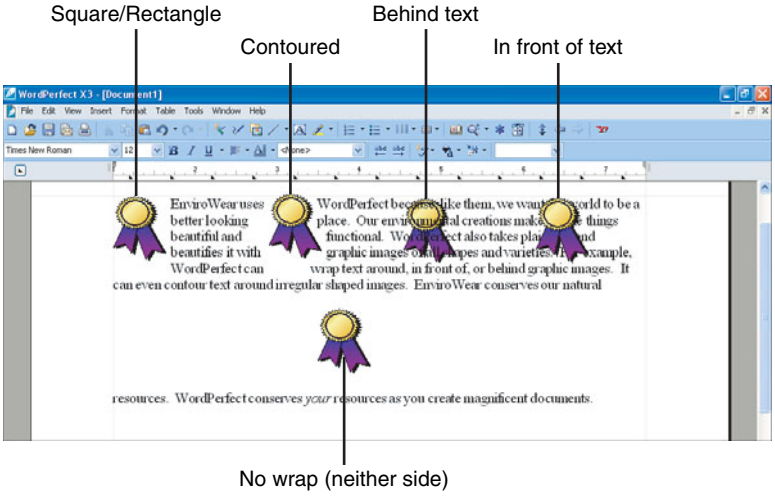

Figure W1.2
Wrapping text means making room around a graphics box for the text that surrounds it. You can also wrap text in front of or behind images.

WordPerfect offers five basic options for wrapping text around an image (see Figure W1.2 for examples of each):

- **Square**—This option leaves a small margin of white space between the outside of the graphics box rectangle and the text that surrounds it. The side the text appears on depends on the other options you choose. For example, you can choose to wrap text on both sides, on the left or the right sides, or only on the largest side (the side with the most text).

CAUTION

> If you use the option to wrap text around both sides, you should check the wrapped text to make sure the image has not split words and that the way the words wrap makes sense. Consider not only the visual result, but also the text flow; because wrapped images interrupt the text flow, you need to verify that the reader will be able to follow along.

- **Contour**—Using the Contour option, you can wrap the text so that it contours to the image contained in the box, instead of to the box itself (refer to Figure W1.2). This can result in a very professional-looking document. You can also specify which sides the text appears on. Note, however, that if you add a border of any kind to a contoured graphics box, the wrap option reverts to Square.
- **Neither Side**—This option means you do not wrap text around the box, but instead, leave blank spaces on each side of the graphic image. In effect, the text wraps only on the top and bottom of the graphic image. For example, equation graphics boxes, by default, do not wrap on either side.
- **Behind Text**—When you place an image behind the text, or in front of the text, you effectively turn off wrapping altogether. This option is used whenever you need to position an image without disturbing the text around it, such as in a poster (see Figure W1.3).

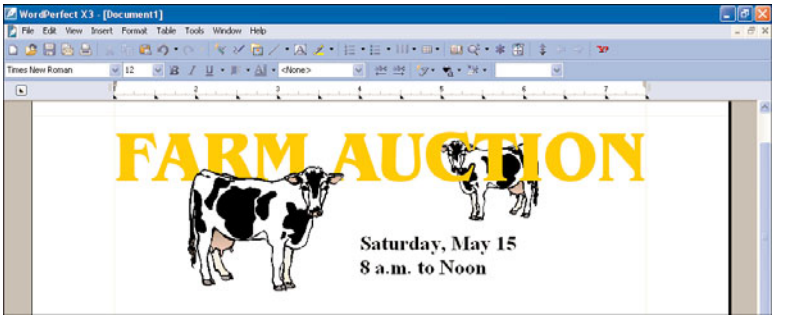

Figure W1.3
By turning off the wrap option, placing a larger image in front of the text and a smaller image behind the text, you create a sense of three-dimensional depth in a sign or poster.

- **In Front of Text**—When you place an image in front of the text, you also effectively turn off wrapping altogether. You often use this option in documents such as posters where covering part of the image with text doesn't interfere with what's being presented (refer to Figure W1.3).

NOTE

If you select the In Front of Text option but the graphic doesn't print in front of the text, try choosing the option from the Advanced tab in the Print dialog box to Print Text As Graphics.

TIP

An even easier way to select a wrap style is to click the Wrap button from the property bar. As you hover the mouse pointer over each option, WordPerfect previews the effect in the document itself. You can click an option to apply it to the selected graphics box.

WORKING WITH GRAPHIC LAYERS

If you add more than one graphic element at the same location, you create layers of graphics. The bottom layer is the image you inserted first, and the top layer is the graphic you inserted most recently. If you select an object and also move it, that object moves to the top layer. WordPerfect also helps you specify the order of the graphics layers.

By changing the size and order of the objects in the layers, you can combine graphics into interesting and effective images. For example, in Figure W1.4, four clip art images are shown in their original size. If you want to create a stack of dollar bills, make that and the stack of gold bullion proportional to Scrooge, and place a dollar bill floating behind him, you must change the order of the layers.

If you're having trouble selecting the graphics box you want, see "Selecting the Correct Graphics Box" in the Troubleshooting section at the end of this chapter.

If you accidentally double-click an image, see "Exiting the Graphics Editing Screen" in the Troubleshooting section at the end of this chapter.

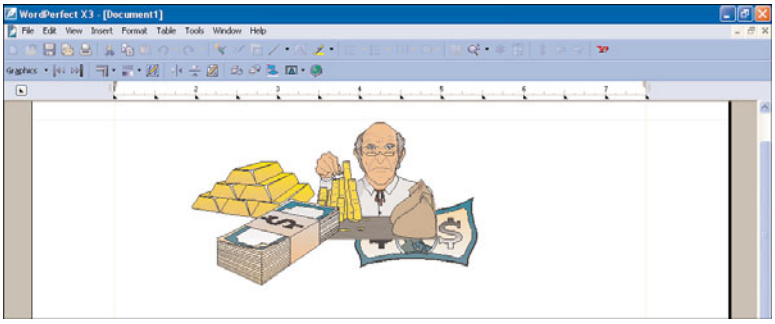

Figure W1.4
Four graphic images have been inserted in the document, layered one on top of another, at their original size.

To change the order of graphic object layers, follow these steps:

1. Click the object you want to change (for example, the flying dollar bill object).

TIP

> If you select an image, but the sizing handles don't seem to match the graphics box for that image, click again until you select the correct box. This works even if the box you want to select is hidden behind another image.

2. Click the Graphics menu on the property bar (see Figure W1.5), or right-click the object and choose Order from the QuickMenu.

Figure W1.5
You can access Graphics menu commands from the property bar or from the QuickMenu.

3. From the menu, choose one of the following options:
   - **To Front**—This moves the object all the way forward to the top layer.
   - **To Back**—This moves the object all the way backward to the bottom layer.
   - **Forward One**—This moves the object forward only one layer. Other objects may still remain on top of or in front of it.

- **Back One**—This moves the object back only one layer, so other objects may remain beneath or behind it.

4. Repeat steps 1–3 until all the objects are in the proper order.

Now, after you adjust the size (by dragging the sizing handles of the graphics box) and position (by dragging the graphics box) of the graphic objects, you create the effect of a composite graphic image, as shown in Figure W1.6. You may have to resize, relocate, and reorder images several times to get just the effect you want.

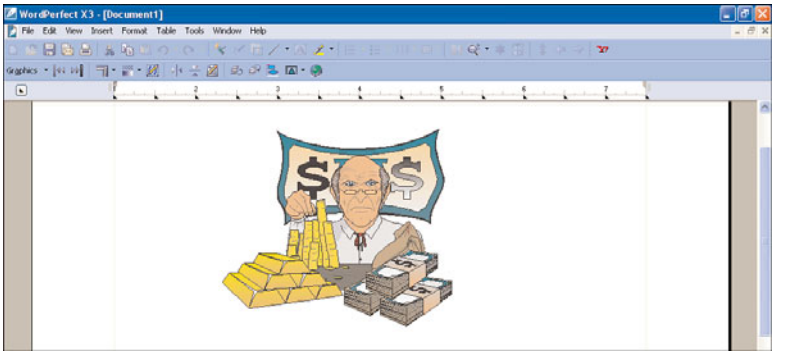

Figure W1.6
You can size, position, and change the layer order of multiple graphics to create the effect of one image.

NOTE

Setting some images to wrap in front of the text and others to wrap behind the text creates two separate groups of graphics layers, each separated by the text itself. If you try to make a graphic that is behind the text move to the front, it only moves to the top layer of all the images that reside behind the text. Likewise, moving an image that is in front of the text all the way to the back causes it to move only to the bottom layer of all the images that reside in front of the text.

CHANGING SIZE AND CONTENT OPTIONS

Moving and sizing objects with the mouse is quick and easy but not always perfectly accurate. If you're creating a complicated layout of text and graphics, you might find it easier to use dialog boxes to specify exact locations, sizes, and content of the graphics boxes.

To specify an exact size for a graphics box, follow these steps:

1. Select the graphics box.
2. Click the Graphics menu button on the property bar, or right-click the graphics box.
3. Choose Size from the menu. WordPerfect displays the Box Size dialog box (see Figure W1.7).
4. Set the width and height and click OK.

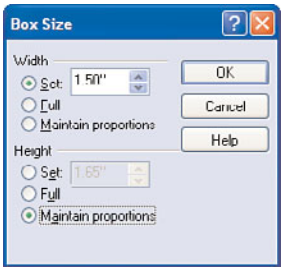

Figure W1.7
You can use the Box Size dialog box to specify an exact height or width of an image.

The options for width and height include the following:

- **Full**—This means that the graphic will extend from margin to margin.
- **Set**—Use this option to specify the exact measurement of the graphics box. This is particularly useful when you want several images to be exactly the same size, such as in a photo gallery.
- **Maintain Proportions**—Unless you intend to distort the image, you should set the exact size of one side, and then choose this option for the other.

ANCHORING IMAGES

By default, WordPerfect images are anchored to a page. That is, if you move the text, the images remain at the same location on the page. You can also anchor images to paragraphs or to characters. In these cases, the images move as the text moves. To set the exact position of a graphic image, follow these steps:

1. Select the image.
2. Click the Graphics menu on the property bar, or right-click the image and select Position.
3. Choose one of the following methods from the Attach Box To drop-down list for anchoring the graphic, and specify the image's precise location:
   - **Page**—This is the option to use if you want the image at a specific location on a page, regardless of how the text around it changes. The position options change in the Box Position dialog box (see Figure W1.8) if you select a different anchor. You can adjust the horizontal position relative to the left edge of the paper, the margins, or text columns. You set the vertical position relative to the top edge of the page, or to the top or bottom margins. Typically, the image moves with the text of the page it is anchored to, but if you check Box Stays on Page, the image remains on the current page (for example, page 1).
   - **Paragraph**—This is the default option, which attaches the box to a paragraph (see Figure W1.9) and which makes the box move with the paragraph. You can specify the horizontal position relative to the left edge of the paper, to the margins, or the center of the paragraph. You set the vertical position relative to the top of the

paragraph. With the box anchored to the paragraph, when you drag the box with the mouse, a pushpin appears to show you which paragraph the box is anchored to (see Figure W1.10).

Figure W1.8
Options for anchoring an image to a page are found in the Box Position dialog box.

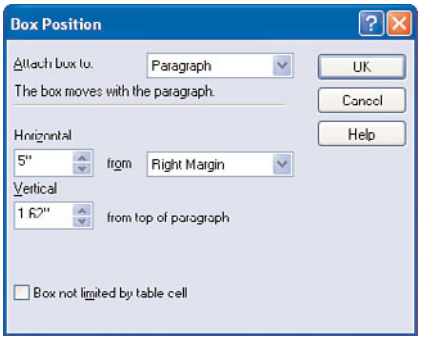

Figure W1.9
You can choose Paragraph in the Box Position dialog box to display these options.

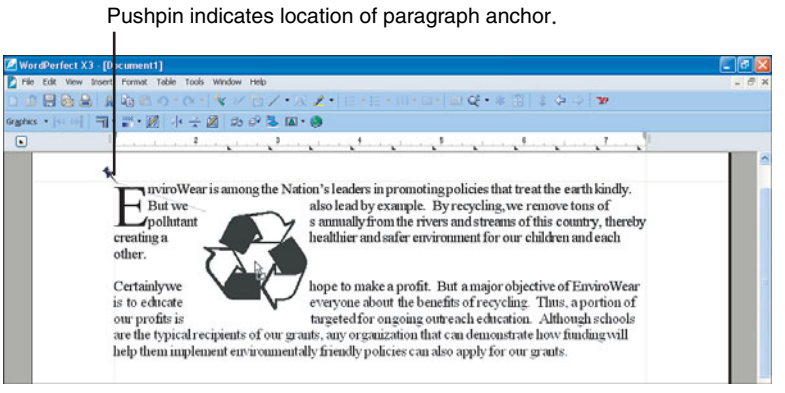

Figure W1.10
When an image is anchored to a paragraph, a pushpin appears as you move the graphic to show you where it is anchored.

- **Character**—The image moves as the character it is anchored to moves. Note in Figure W1.11 the many options for positioning the image relative to the character. The preview box shows the effect of each option. Character anchoring is a more precise way to attach an image to your text, but it also can cause problems with the text that surrounds it because the line height of the text changes to accommodate the graphic image (see Figure W1.12).

4. Click OK to apply the specified positioning to the image.

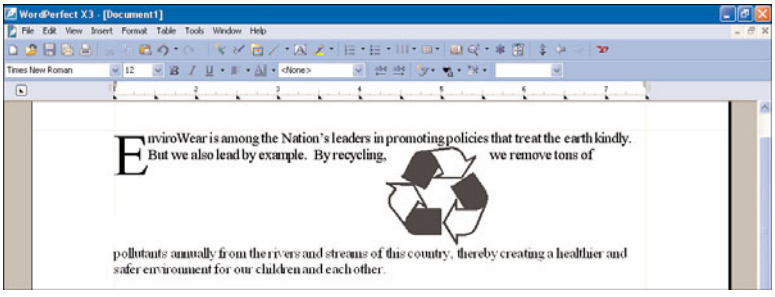

Figure W1.11
You can choose the character anchor type to display these options, which enables you to preview the results.

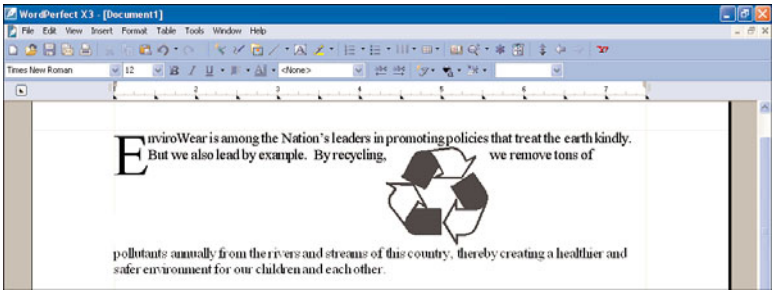

Figure W1.12
If you anchor an image to a character, you cause the text line height also to change to the height of the graphics box.

If you're having trouble with graphics not moving when you edit your text, see "Anchoring Images Correctly" in the Troubleshooting section at the end of this chapter.

USING ALIGN AND DISTRIBUTE

The Align and Distribute feature enables you to position objects on the screen more precisely than you can by merely dragging and dropping the objects. For example, if you want several graphic objects to appear evenly spaced across the top of the page, such as in a photo gallery of your real estate offerings, you can use the Align and Distribute feature to place each object in its proper place, quickly and easily.

The Align and Distribute tool involves two separate concepts and procedures. One is to align all the objects relative to a location on the page. The other is to distribute all the objects relative to one another.

To align five graphics across the top of the page, follow these steps:

1. Select all five objects by holding down the Shift key while clicking on each separate object. Note that you can select graphic images, graphic shapes, or even text boxes (see the example in Figure W1.13).

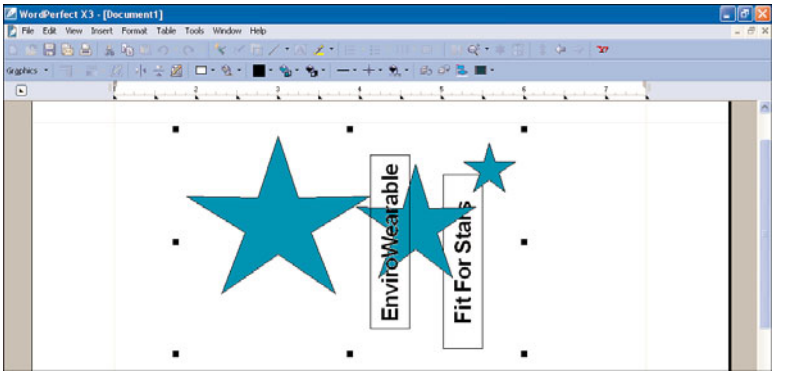

Figure W1.13
You can align and evenly distribute several objects at once by selecting them and using the Align and Distribute tool.

2. Click the Align and Distribute button on the property bar, or right-click the selected objects and choose Align and Distribute from the QuickMenu. WordPerfect displays the Align and Distribute dialog box (see Figure W1.14).

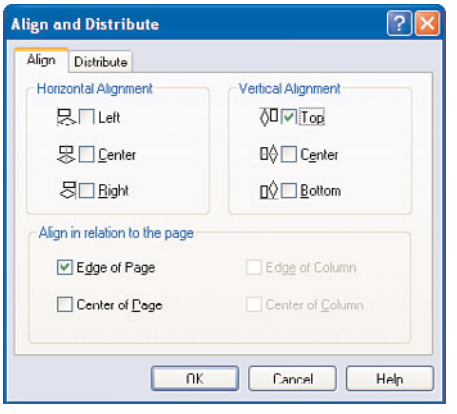

Figure W1.14
Use the Align options in the Align and Distribute dialog box to align objects relative to the page and to one another.

3. On the Align tab, choose the location on the page where you want to align the objects. For example, if you want all the objects aligned at the top edge of the document, select Top from the Vertical Alignment section, and Edge of Page from the Align in Relation to the Page section.
4. Click OK to align the objects at the top margin.

WordPerfect warns you that using this tool might change the anchor positions of the objects. Go ahead and click OK, because you can always use Undo if things don't work the way you expect them to. Note also that WordPerfect maintains the relative horizontal position of the selected objects.

TIP

> Don't forget that before you can use Undo, you must first click somewhere else in the document to deselect any graphic images you might have selected.

NOTE

> You can use the Align option to align single objects. However, you must have at least two objects selected to use the Distribute option.

To spread the objects evenly across the page, follow these steps:

1. With the objects selected, click the Align and Distribute button on the property bar, or right-click the selected objects and choose Align and Distribute from the QuickMenu. WordPerfect displays the Align and Distribute dialog box.
2. Click the Distribute tab to view the Distribute options (see Figure W1.15). If the options are grayed out, you have only one object selected, and you have to go back and select at least two objects before you can use the Distribute option.

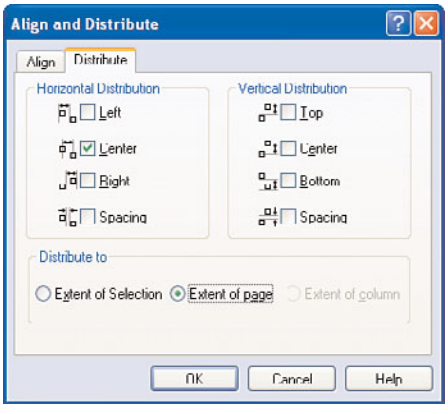

Figure W1.15
Use the Distribute options in the Align and Distribute dialog box to spread out objects relative to the page and to one another.

3. Select any horizontal option to spread the objects horizontally, or any vertical option to spread them vertically. The options refer to how the objects line up relative to evenly spaced division points across the page. For example, choosing Center aligns the center of the objects on those division points.
4. Click Extent of Selection if you want the objects to spread across the space currently occupied by the selected objects, or select Extent of Page if you want them to spread from margin to margin.

5. Click OK, and WordPerfect distributes the objects evenly across the page, as shown in Figure W1.16.

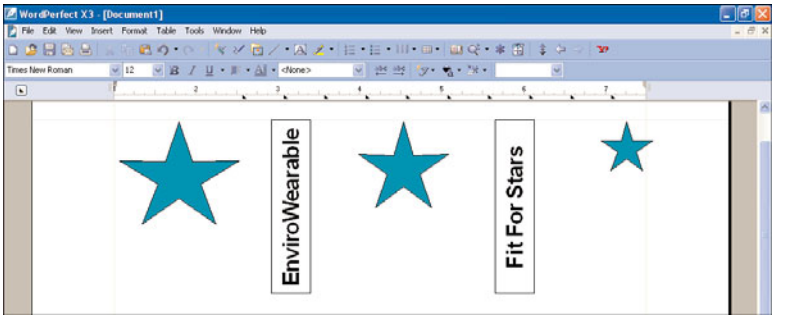

Figure W1.16
The Align and Distribute feature makes it easy to position multiple objects evenly across the page.

NOTE

> Unless you have several objects selected, you might see little, if any, difference when choosing different distribution options. You might have to experiment to find which settings work best for you.

ADDING CAPTIONS

Image captions are useful for identification. Not only can you add text description, but you also can add figure numbers that automatically sequence throughout the document.

To add a caption, follow these easy steps:

1. Select the graphic.
2. Click the Graphics menu on the property bar, or right-click the graphic and choose Caption. WordPerfect displays the Box Caption dialog box (see Figure W1.17).

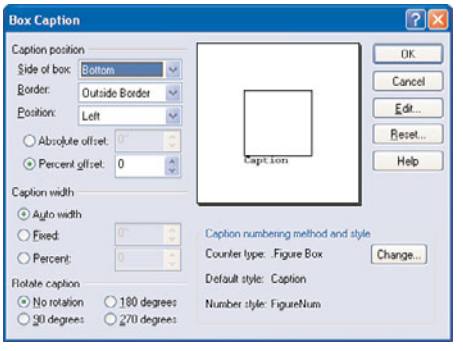

Figure W1.17
The Box Caption dialog box enables you to create, edit, and position captions for a graphics box.

NOTE

> If you just want to add a caption, using the default caption settings, you can right-click the image, and choose Create Caption from the QuickMenu.
>
> You cannot add captions to graphic shapes such as lines or arrows, but you can add them to clip art, other images, or text you place in a graphics box.

3. Click Edit to create the text of the caption. WordPerfect automatically places the figure numbering style along with the text *Figure n* (where *n* is the number of the box to which you're adding a caption). If you don't want that information, press Backspace once to delete it.
4. Type the caption information. Use the property bar to modify the font, size, and other attributes of the text.

CAUTION

> The font of the caption is based on the document default font. If you change the font in the text but don't change the default font, the caption font might not match your text.

5. Click the Close button on the property bar to return to your text, or just click in the text area. WordPerfect adds the caption to your graphics box, as shown in Figure W1.18.

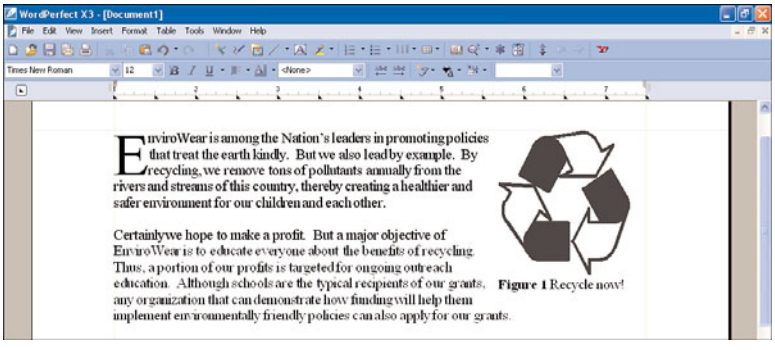

Figure W1.18
Captions add information and are numbered sequentially to help you refer the reader to the images in your document.

NOTE

> When you add a caption outside the graphics box border, the graphics box extends to include the caption, but a graphics box border surrounds only the image. Document text wraps around both the image and the caption.

By default, WordPerfect creates captions that appear at the bottom left, outside the graphics box border. Using the Box Caption dialog box (refer to Figure W1.17), you can modify the caption to fit your needs. The options include the following:

- **Side of Box**—You can place the caption on the top, bottom, right, or left of the graphics box.
- **Border**—You can place the caption inside or outside the box border.
- **Position**—You can position the caption at the left or right, top or bottom, or center of the side you select. Or you can be even more precise by specifying an exact offset, by measurement or by a percentage of the available width.
- **Caption Width**—You can let WordPerfect do the calculating for you, or you can specify an exact measurement or percentage of available space for the width of your caption.
- **Rotate Caption**—If you place the caption on either side of the graphics box, you might want to rotate the caption 90 degrees (left side) or 270 degrees (right side). Rotating top or bottom captions doesn't make much sense, but you can do it.
- **Caption Numbering Method and Style**—By default, WordPerfect counts boxes according to the types of boxes they are. For example, each figure box is numbered sequentially, as are text boxes, equation boxes, and so on. You can change the box type, which also changes the box number. However, unless you are working with a long document where box numbers are important, you do not need to change the box type.
- **Reset**—Use this option if you want to delete a caption. This also sets options back to their original defaults.

ADDING TEXT BOXES AS GRAPHIC OBJECTS

Text boxes are similar to graphics boxes except that their content is text instead of graphic images. Text boxes are useful for adding labels to your document—for example, on top of a graphic image.

CREATING TEXT BOXES

To create a text box, follow these steps:

1. Position the cursor where you want to place the text box.
2. Click the Text Box button on the toolbar, or choose Insert, Text Box from the menu. WordPerfect places in your document a text box with a single-line border, aligned at the right margin (see Figure W1.19). The hash marks around the text box and the blinking cursor indicate that WordPerfect is waiting for you to add or edit text.
3. Type, edit, and format the text of the text box. If the text wraps, or if you press Enter, the box expands vertically.
4. Drag the right-center sizing handle toward the text so that you don't have a lot of extra white space in the right side of the box.
5. Move the box itself by positioning the mouse pointer at the edge of the box (the pointer becomes a four-way arrow) and dragging the box to the desired location.
6. Click outside the box to deselect it.

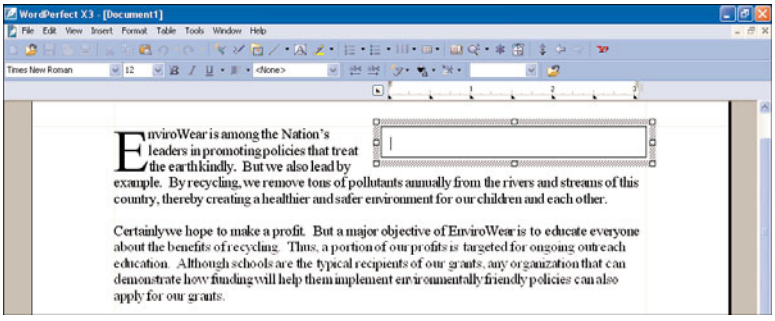

Figure W1.19
A text box is distinctive in that it is surrounded by hash marks, and the blinking cursor indicates where to type or edit text.

NOTE

> To edit a text box, click the text area of the box. To move a box, however, you must move the mouse pointer to the edge of the box until you see the four-way arrow. To select a box to delete it, you must first click the edge of the box. Otherwise, you delete only text within the box.

You can apply all box-formatting options to text boxes, the same way you do to graphics boxes. For example, you can change the way text wraps around the text box; add a border, background, or a caption; and so on.

TIP

> If you want to add a text label to a graphic image, create a text box and wrap it in front of the text. You might have to change the order of the graphic image and the text box so that the text box appears in front of the image.

ROTATING TEXT

Often you need labels that aren't horizontal. Fortunately, you can easily rotate the text within a text box. To rotate text in a text box, follow these steps:

1. Select the box. Remember that you must click at the edge of the box, not in the text area, so that the Graphics property bar appears.
2. Click the Graphics menu on the property bar and choose Content. WordPerfect displays the Box Content dialog box (see Figure W1.20).
3. From the Rotate Text Counterclockwise section, choose 90, 180, or 270 degrees.

NOTE

> You can rotate the contents of a text box only in 90-degree increments. If you need to rotate text at some other angle, you must create the text as a graphic drawing object.

➔ For more information on adding custom text images, see "Creating Specialty Text," later in this chapter.

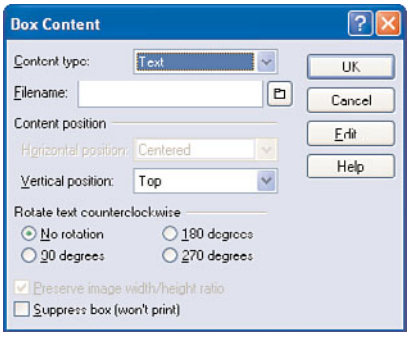

Figure W1.20
You can use the Box Content dialog box to rotate text in a text box.

4. Click OK to rotate the text in the text box.

If you rotate text, the editing process for that text changes. When you click the text box that contains rotated text, WordPerfect opens a Text Box Editor screen (see Figure W1.21). Although it appears that you have the entire screen to work with, WordPerfect limits the editing area to match the width of the text box itself. Make any changes you want and click the Close button on the property bar to return to the document.

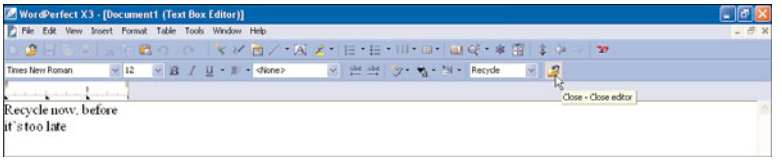

Figure W1.21
When editing rotated text, you use the Text Box Editor screen. Note that text wraps at the text box margins, not at the margins of the editing screen.

TIP

If you intend to add a lot of text to a rotated text box, select the box first and drag the side sizing handles to give yourself more room. Then, click the center of the box to enter the Text Box Editor screen.

If you want to move a rotated text box and can't do so without going into the special editing screen, see "Moving a Rotated Text Box" in the Troubleshooting section at the end of this chapter.

STICKY NOTE BOXES

One particularly useful text box style is the Sticky Note text box. This box is similar to other text boxes, but it contains a yellow background, and it wraps in front of your document text, just like a sticky note! Unfortunately, this custom text box is a bit hard to find unless someone shows you where it is.

To add a sticky note to your document, follow these steps:

1. Position the cursor on the line where you want the sticky note.
2. Choose Insert, Graphics, Custom Box. WordPerfect displays the Custom Box dialog box (see Figure W1.22).

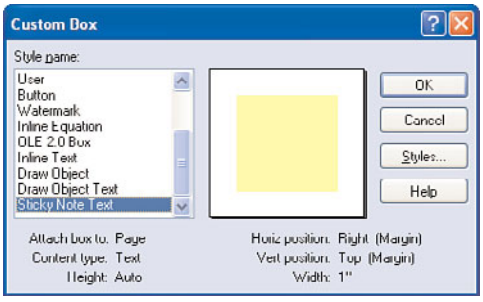

Figure W1.22
Among styles available in the Custom Box dialog box is the Sticky Note Text style.

3. Scroll through the Style Name list box, and select Sticky Note Text.
4. Click OK to add a sticky note text box to your document.

You edit and manipulate the Sticky Note text box the same way you do any text box. Because the box covers text, you might want to have it wrap behind or beside the text, or simply remove it before printing.

➔ For information on WordPerfect's document collaboration features such as Comments, Document Compare, and Document Review, **see** Chapter 14, "Collaborating on Documents," **p. 375**.

WATERMARK TEXT BOXES

Watermarks need not be only graphic images. You can also create your own text watermarks.

To create a text-based watermark, follow these steps:

1. Choose Insert, Watermark from the menu.
2. If you're creating a new Watermark A, click Create.
3. In the Watermark A editing screen, add text and format it. For example, you can change the font, the font size (72 points equals 1 inch high), center the text horizontally, or center the page vertically (by choosing Format, Page, Center).
4. Note in Figure W1.23 that WordPerfect automatically changes solid black text to 25% gray. However, you can also lighten or darken that shading by choosing Format, Font, and by changing the font's shading percentage.
5. If you want, you can also add graphic images along with your text.
6. Click the Close button to add the watermark to your document.

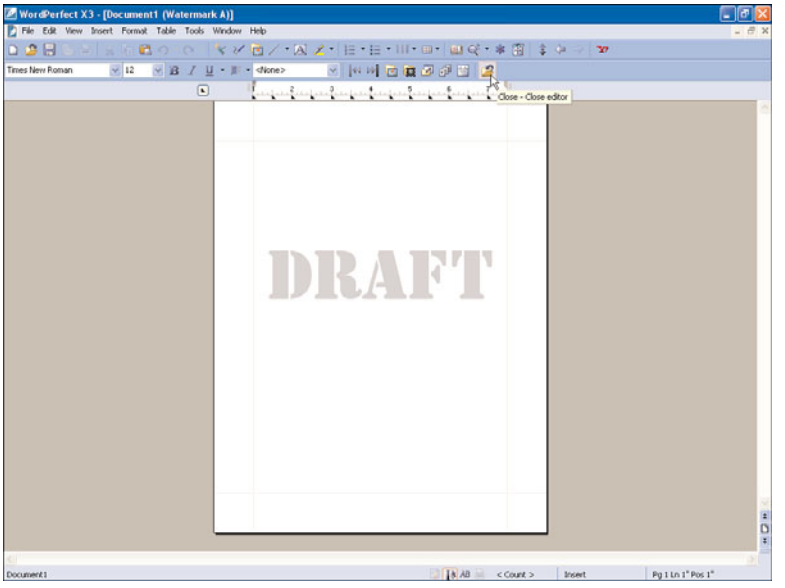

Figure W1.23
Text used as a watermark appears at 25% black. You can use text along with images in a watermark.

➔ To learn more about using WordPerfect's watermark feature, **see** "Using Watermarks," **p. 331**.

CUSTOMIZING GRAPHIC IMAGES

In Chapter 12, "Adding Graphics to Documents," and so far in this chapter, we have focused on modifying and manipulating the graphics box, or the container of the graphic image. Borders, sizing, backgrounds, and wrapping are all elements that apply largely to the box border. But graphics boxes are like windows through which you view the contents—you can also modify or customize what you see inside the graphics box.

CHANGING BOX CONTENTS

You can change the contents of a graphics box, or the way the image is displayed, without affecting the size, border, or other changes you have made to the graphics box itself.

To change the contents of a box, first select the box, and then from the Graphics menu on the property bar, choose Content. WordPerfect displays the Box Content dialog box (see Figure W1.24), where you have the following options:

- **Content Type**—Typically, content is an image. However, you can also choose Empty (a box with nothing in it), Text, or Equation. A final choice, Image on Disk, is useful if you want to display and print the image with the document but don't want to store a copy of the image in the document itself. For example, if you specify that the graphics used for a letterhead logo remain on a disk, you don't store a separate copy of the image with each letter you produce.

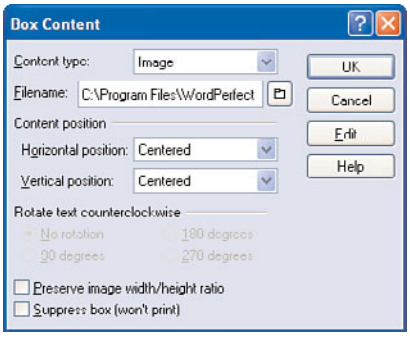

Figure W1.24
You can use the Box Content dialog box to change the image or to change the type of content used in a box.

CAUTION

> If you choose to use the Image on Disk option, the image does not print if someone else who does not have access to that image tries to print the document. In a network environment, be sure that images you want everyone to use are accessible by everyone before using this option.

NOTE

> If you edit the image (for example, you double-click the image and open it in the Draw program), the content type changes to an OLE object, and the filename changes to Presentations 12 Drawing.

- **Filename**—You can use the Browse button to find and insert a graphics file into the current box, replacing the one that's already there.
- **Content Position**—These settings affect where the content appears within the box. By default, images are centered both vertically and horizontally. However, if you change the box size, you might want to position the image at the left or right, or at the top or bottom of the box. If the content of the box is text, you can also rotate the text in 90-degree increments.
- **Preserve Image Width/Height Ratio**—If you drag the side sizing handles when reshaping a box, the graphic image also becomes distorted. Check this option to prevent image distortion.
- **Suppress Box (Won't Print)**—This option means that WordPerfect prints the document with space reserved for the image but does not print the image or the box border or caption, if any.

USING IMAGE TOOLS

WordPerfect's image tools enable you to customize a graphic image. You can move the image within the graphics box, rotate it, flip it, size it, or change its brightness and contrast.

To access the image tools, first select the graphics box of the image you want to edit and then click the Image Tools button on the property bar or right-click the graphics box and choose Image Tools from the QuickMenu. WordPerfect displays the Image Tools dialog box (see Figure W1.25).

Figure W1.25
The Image Tools dialog box enables you to modify the image inside a graphics box.

Typically, you choose an option and use the mouse, or select from palettes of options to make changes to the image. The following are some of the options:

- **Rotate**—Click this option, and WordPerfect displays four diagonal sizing handles at the corners of the image, but inside the graphics box. Drag a handle to the right or left to rotate the image inside the box.

TIP

When you rotate an image, often the edges of the image don't fit within the box without being trimmed. To avoid this, scale (zoom) the image to a smaller size, and then rotate it.

- **Move**—After clicking this option, drag the image in any direction. Remember that the graphics box is like a window through which you view the graphic image. If you move part of an image beyond the border of the graphics box, you place it out of sight, and that part of the image does not display.

TIP

You can move an image beyond the edge of a graphics box border if you want to crop or trim part of the image. For example, if the very bottom of an image isn't pertinent to your document, you can move the image down far enough so that the edge of the box crops the bottom of the image.

- **Flip**—You can flip the image horizontally, flip the image vertically, or both.

> **TIP**
>
> If all you want to do is flip the image, just click the Flip buttons on the property bar and bypass the Image Tools dialog box altogether.

- **Zoom**—Clicking this option gives you a palette of three choices (see Figure W1.26). The magnifying glass enables you to click and drag an area of the image. WordPerfect then zooms to that area. Clicking the up/down arrow displays a scrollbar that enables you to decrease (up) or increase (down) the size of the graphic image. The 1:1 option restores the image to its full, original size.

Figure W1.26
The three image zoom tools enable you to crop an image, scale it, or restore it to its original size.

- **BW Threshold**—If you want to print the image in black and white (without shades of gray), choose one of the options on the BW Threshold palette. To turn color back on, click the large X button on the palette.
- **Contrast**—This palette, which is similar to the Brightness palette shown in Figure W1.27, enables you to adjust the dark/light contrasts in an image.

Figure W1.27
The Brightness palette enables you to choose a preset brightness. The Contrast palette looks similar and works the same way.

- **Brightness**—This palette (refer to Figure W1.27) helps you choose a shading for the colors of the image. Watermark images, for example, use buttons from the bottom row of the palette.
- **Fill**—These options generally aren't that useful. The blue butterfly is the default (as shown in the Brightness and Contrast palettes) when you use all of the image's colors. The others display only those parts of the image that are black and white.
- **Invert Colors**—This option creates a negative of the image.
- **Edit Contents**—This option opens the image in the Drawing Editor.
- **Edit Attributes**—If you need to make precise settings to a variety of attributes, you can choose this option to display the Image Settings dialog box (see Figure W1.28), where you select the attributes you want to change, specify exact settings, preview the results in the preview box, and click OK to apply them to the image.

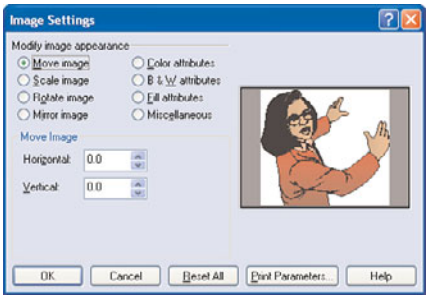

Figure W1.28
The Image Settings dialog box enables you to specify by exact numbers the changes you want and to preview them.

- **Reset Attributes**—If you want to restore all the original image settings, choose this option.

To close the Image Tools dialog box, click anywhere in the document, or click the Close button on the dialog box.

CREATING AND EDITING IMAGES IN PRESENTATIONS

The preceding sections deal with modifying a graphics box or an entire image—for example, its brightness or rotation. However, if you install Corel Presentations as part of the WordPerfect Office X3 suite (which is highly recommended), that program also serves as the Drawing Editor in WordPerfect. With it, you have a full range of options for editing WordPerfect clip art and other graphic images, or for creating original artwork. For example, you can create specialized text, or you can remove or add parts of images.

Most of the details of using Presentations for creating and editing graphics can be found in Chapter 32, "Working with Graphics and Multimedia Elements in Presentations." However, because you can use Presentations directly in WordPerfect, you need to know how to access and use Presentations features while working in WordPerfect.

ACCESSING PRESENTATIONS THROUGH WORDPERFECT

When you choose Insert, Graphics, Draw Picture, or click the Draw Picture button on the toolbar, WordPerfect opens an editing window in which you can create and edit graphics using the tools found in the Corel Presentations drawing program (see Figure W1.29). In addition to the window, you also see somewhat different toolbars. At the left side of the screen is a tool palette that looks a lot like some of the tools you use when working with graphic shapes and boxes. Further, if you click some of the menu items, you notice that certain features you're used to seeing are gone, replaced by other features you've never heard of before.

NOTE

The Draw Picture feature is actually a window into the Corel Presentations program. If you use a standalone version of WordPerfect, or if you did not install Presentations when you installed the WordPerfect Office suite, the Draw Picture feature is not available to you. I highly recommend that you install Presentations if it is available.

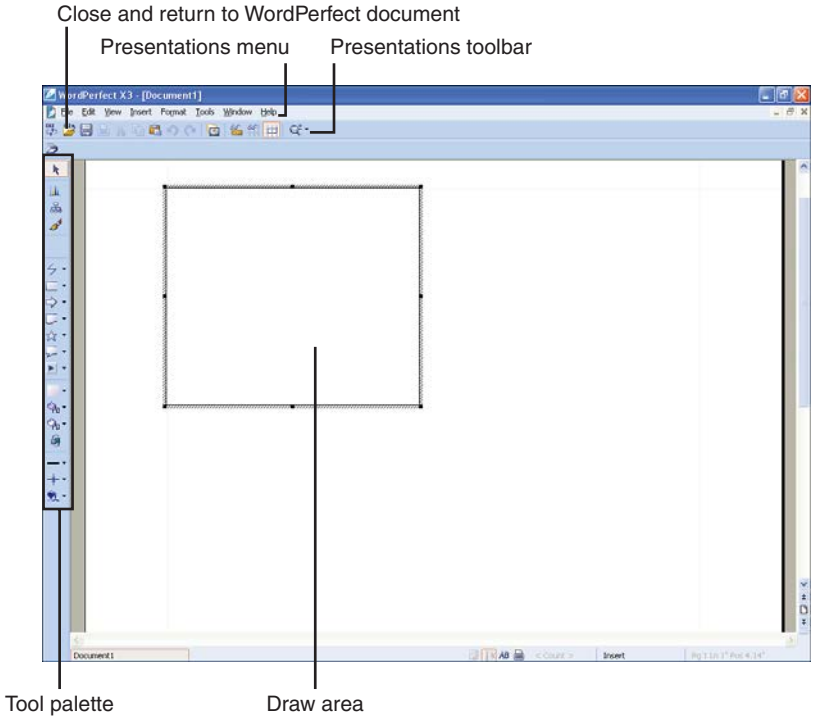

Figure W1.29
The Draw program is actually the Corel Presentations program and works right within WordPerfect.

WORKING WITH DRAW

When you create a new Draw figure, WordPerfect limits you to a predetermined portion of the WordPerfect screen. You can stretch or shrink that editing window to fit your needs.

NOTE

For the sake of brevity, we refer to the Draw Picture program simply as Draw (for example, "Use Draw to create a text line").

If you want to edit a graphic image, double-click the image to open an editing window the same size as the image's graphics box.

However, if you want to open a larger editing window, hold down the Alt key and double-click the image. WordPerfect opens a separate Corel Presentations drawing window (see Figure W1.30). This window can be sized as large as you'd like it to be. You can even maximize the window to a full screen. Using this separate window can make it easier to see and work with your drawing. When you close the window and return to your document, WordPerfect scales the drawing to fit the original image window in your document.

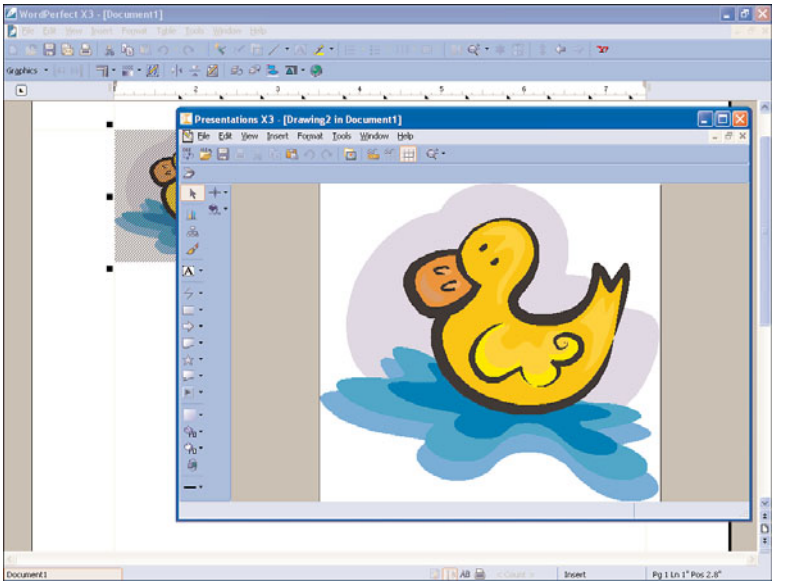

Figure W1.30
If you use the Alt key while double-clicking an image, you open a larger Presentations editing screen.

TIP

When editing a graphic image in WordPerfect, hold down the Alt key and double-click to open a full Corel Presentations editing screen.

When you create or open a Draw window in WordPerfect, you then can use all of Presentations's drawing features to create graphic images or specialized text.

→ To learn more about using the Drawing Editor (Corel Presentations) to edit images, **see** Chapter 32, "Working with Graphic and Multimedia Elements in Presentations," **p. 795**.

CREATING SPECIALTY TEXT

Although WordPerfect is the premiere program for creating, editing, and formatting text, when it comes to graphical presentation of text, Draw (Presentations) offers several advantages, including the following:

- Text rotated at any angle
- Gradient shaded text
- Text shaped to curved objects
- Three-dimensional text
- Text warped to fit predefined shapes

In WordPerfect, you can rotate text in text boxes only in 90-degree increments. However, if you want to angle text at 45 degrees, for example, you need to create the text in Draw and add the graphics box containing the text to your document.

To create text in Draw, follow these steps:

1. Choose Insert, Graphics, Draw Picture, or click the Draw Picture button on the toolbar. WordPerfect opens the Draw editing window (refer to Figure W1.29).
2. Click the drop-down menu or the Text Objects button on the Draw tool palette to display text options (see Figure W1.31), which include the following:

Figure W1.31
Draw offers a variety of ways to create text objects.

- Create a text box when you want to create more than one line of text.
- Create a text line when you want to limit the text to just one line.
- Create a bulleted list.
- Create text with special effects, such as that created by TextArt or QuickWarp.

TIP

Often, working with text lines, rather than text boxes, is more efficient in the long run because you can rotate and rearrange text more easily.

3. Click the tool you want (for example, text line) and move the mouse pointer to the area of the screen where you want to start the text line. Note that the mouse pointer becomes crosshairs.
4. Click to begin the text line.
5. Type the text.
6. Select the text where you want to change or add the formatting, such as font, size, and bold.
7. To close a text box, click anywhere else on the Draw screen. To close a single line of text, you can also press Enter.

ROTATING AND SKEWING GRAPHIC TEXT

Although you already selected a font size, you may want to make some adjustments. For example, you can drag any of the four sizing handles of a text box in Draw to make the text larger or smaller. You can also rotate or skew the text in small increments.

To rotate a text object, follow these steps:

1. Single-click the text box you want to rotate to select it.
2. Click the Rotation Options button on the toolbar, and choose Manual Rotation, or right-click the object and choose Rotate from the QuickMenu. WordPerfect places rotation and skewing handles around the outside of the text box and an axis in the center of the box (see Figure W1.32).

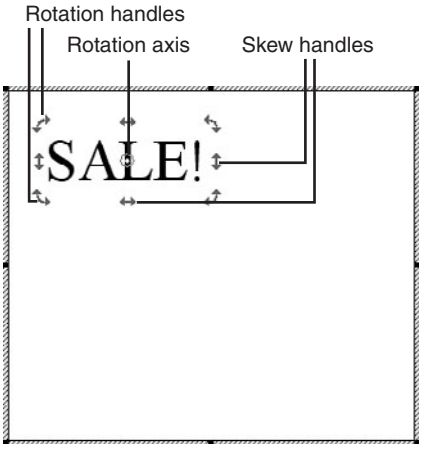

Figure W1.32
You can rotate or skew Presentations text at unlimited angles in Draw.

3. Drag a corner handle to rotate the text on its axis.
4. Drag a side handle to skew the text.

Finally, before returning to your document, you should make the Draw screen approximately the same size as the text box. The borders of the Draw screen become the borders of the graphics box that contains the special text, and you don't want too much empty space between the text and borders of the box. Simply move the text object to the upper-left corner of the Draw screen, and then drag the sizing handles of the Draw screen to fit the text box (see Figure W1.33). Click in your document to close the Draw screen.

Figure W1.33
You should try to make the size of the WordPerfect graphics box match the size of the objects it contains.

If you tried to use the menus to return to your document and can't figure out how to make Draw work, see "How to Get Out of the Draw Screen" in the Troubleshooting section at the end of this chapter.

TIP

You can add as many graphic elements as you want to a single draw screen, including clip art, shapes, and text, all of which become a single graphics box in WordPerfect.

MODIFYING GRAPHIC TEXT APPEARANCE

In WordPerfect, you can change a font's style and color. In Draw, you can make many other changes as well. To modify a text object in Draw, select the text object and choose Format,

Font. Alternatively, you can press F9 or right-click the object and choose Font. WordPerfect displays the Font Properties dialog box, which offers a wide range of font options.

The Font tab of the Draw Font Properties dialog box (similar to the Font dialog box found in WordPerfect) enables you to choose font type (Face), size, color, and other basic attributes, and to preview the results.

➔ For information on using fonts, **see** "Choosing the Right Font," **p. 62**.

The Fill, Outline, and Shadow tabs enable you to modify the look of the font itself, including colors, patterns or gradient shading, font outlining, and drop shadows. The procedures are the same as for modify shape properties, as described in Chapter 32.

➔ For information on modifying font or shape properties, **see** "Working with Shapes," **p. 801**.

When you finish your text modifications, click OK to return to the Draw screen. An example of text changes you can make in Draw is shown in Figure W1.34, where the text has gradient shading, no border line, and a transparent gray shadow.

Figure W1.34
It's easy to customize graphic text using Presentations, as in this text that displays a different font, gradient shading, no border line, and a transparent gray shadow.

ADDING SPECIAL EFFECTS TO TEXT

Draw includes two special-effects options that apply to text as well as to other graphics objects. Quick 3-D adds dimension and shading to text, and QuickWarp fits text into a predefined shape.

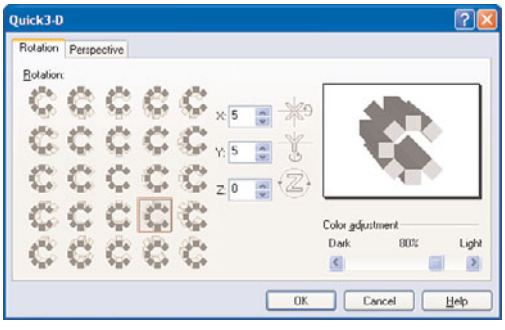

Figure W1.35
You can add 3D effects to text from preset or customized styles in the Quick 3-D dialog box.

To access the Quick 3-D dialog box, select the text object and choose Tools, Quick 3-D (see Figure W1.35). The options you use depend on the look you're trying to achieve. Options include the following:

- **Rotation**—You can click a predefined rotation angle or make your own adjustments to the X, Y, or Z axes of the letters.
- **Color Adjustment**—The percentage of color applies to the face of the letters. The 3D shadow is automatically made proportionally darker.
- **Perspective**—On the Perspective tab (see Figure W1.36), you can choose Linear, Parallel, or Inverse, as shown by the samples.

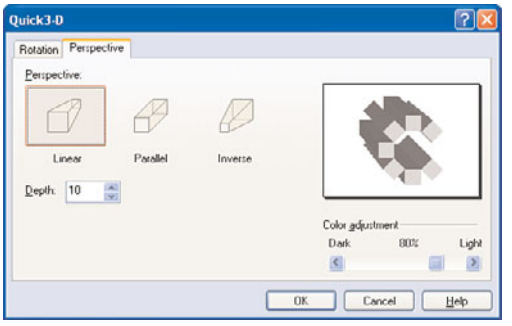

Figure W1.36
You can change the 3D perspective on the Perspective tab of the Quick 3-D dialog box.

- **Depth**—Also on the Perspective tab, you can specify how deep the 3D effect should be.

The QuickWarp feature is similar to TextArt (see the section "Creating TextArt Text" later in this chapter), but with only limited options. When you warp text, you make it change its shape to fit another predefined shape. Choose Tools, QuickWarp to display the QuickWarp dialog box (see Figure W1.37, which shows a shape selected). You can click a shape, preview it, and click OK to add the effect to your text.

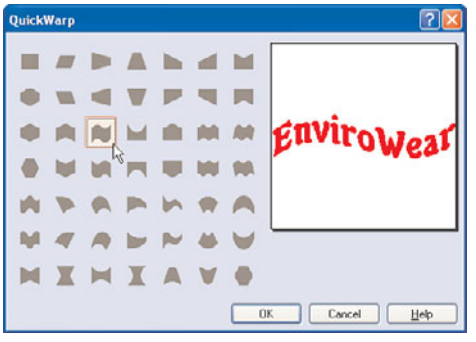

Figure W1.37
You can warp text to fit a predefined shape in the QuickWarp dialog box.

TIP

You can add both the QuickWarp and the Quick 3-D effects to a text or graphic object. For added effect, you can also apply either effect more than once to the same object.

CONTOURING TEXT TO SHAPES

You can contour text to other shapes, such as circles, half-circles, or even flat-sided objects. To contour text to the outside of a circle, for example, follow these steps:

1. Create the text line you want to contour.
2. Create the shape you want the text to contour to—for example, a circle, created from the Basic Shapes button on the tool palette.
3. Select both the text and the shape. If they are the only two objects on the Draw screen, you can choose Edit, Select All. If there are other objects on the screen, click the shape object, and then hold down the Ctrl or the Shift key and click the text object. You must pair one shape object with each text object you contour.
4. Choose Tools, Contour Text. WordPerfect displays the Contour Text dialog box (see Figure W1.38).

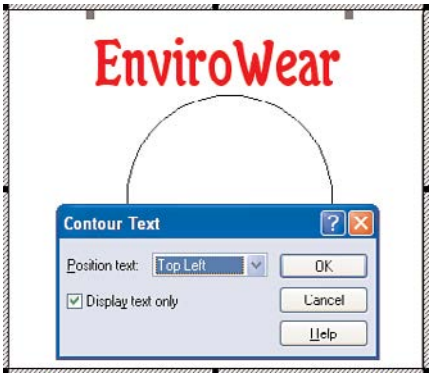

Figure W1.38
You can use the Contour Text dialog box to contour text to another Draw shape.

5. Choose the text position from the Position Text drop-down menu. Choices include Top Left, Top Center, Top Right, Bottom Left, Bottom Center, and Bottom Right.
6. If you want to display the contoured text without the graphic object, leave the Display Text Only box checked.
7. Click OK to contour the text (see Figure W1.39).

Some contoured text looks quite awful, but that's only because of the screen display. The printed result looks nice and clean.

NOTE

Certain software features work better in theory than in principle. Contouring text is one such feature. Single contoured objects seem to work quite well, but if you contour more than one text object (refer to Figure W1.39), you may encounter several problems. One problem is that one of the objects may not display properly. Another is that one of them may not print at all, even if it does display. Contouring to multisided shapes can also prove problematic.

Contouring text can be a cool, useful feature. But be aware that you may have to do a lot of experimenting to get what you really want, if you can get it at all.

Figure W1.39
You can hide or leave visible the object to which text is contoured.

CREATING TEXTART

TextArt is a text effects program that enables you to shape words and short phrases into predefined shapes and add shadows, textures, and dimensions to the text. In some ways, it's like a super version of the Quick 3-D and QuickWarp features found in the Draw program. (See the preceding section for information on Quick 3-D and QuickWarp.)

TextArt is most often used for logos, banners, flyers, and so on. With a little effort, you can create stunning text effects.

CREATING TEXTART TEXT

To create TextArt in a WordPerfect document, or in any of the programs in the WordPerfect Office X3 suite, choose Insert, Graphics, TextArt. WordPerfect opens a large graphics box, along with the TextArt dialog box (see Figure W1.40).

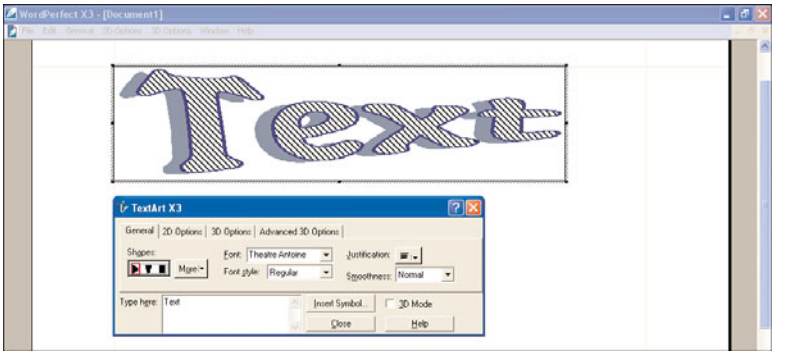

Figure W1.40
You can use the TextArt dialog box to create and modify a TextArt image in a WordPerfect graphics box.

The Type Here box displays the word Text, and the graphics box displays the TextArt effect on the word Text, using settings you selected the last time you used the TextArt feature. To add your own words, type them in the Type Here box. You can also add special characters by

clicking the Insert Symbol button, or by pressing Ctrl+W. Note, however, that you can insert only a limited number of special characters, not the entire range of symbols normally available in the Insert Symbol dialog box.

NOTE

> Although you can type a great deal of text in the Type Here box, generally your TextArt is more effective if you limit it to just a few short words.

Next apply several options to the text you typed, including

- **Shapes**—WordPerfect displays only three shapes, but click the More button, and you have access to 57 different shapes (see Figure W1.41). Click the shape you want, and WordPerfect squeezes and warps the text into that shape.

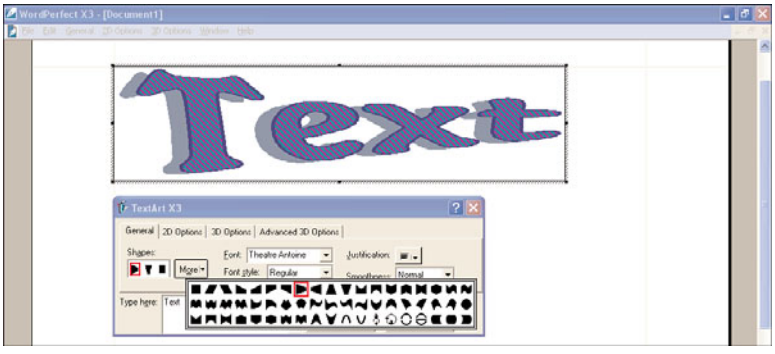

Figure W1.41
You can warp text to 57 predefined TextArt shapes.

NOTE

> Depending on the speed of your computer and the amount of memory you have, TextArt can take up to several seconds to update changes you make. Be patient, and be sure to save your work often!

If you seem to have lost the TextArt dialog box, see "Getting the TextArt Program Back" in the Troubleshooting section at the end of this chapter.

- **Font**—You can choose a font from a list of your installed Windows fonts.

TIP

> The amount of text, the font, and the shape you choose have, perhaps, more impact on what the TextArt shape will look like than any of the other options. Don't be afraid to try out several combinations until you find exactly what you're looking for.

- **Justification**—Normally, this option has little effect on your TextArt because the text fills the entire graphics box. However, if you change the size of the graphics box after creating the text, WordPerfect aligns the text according to your selection.
- **Smoothness**—The resolution of the TextArt drawing can affect display and printing times. Normally, you do not need to change this setting.
- **3D mode**—This option adds another dimension to the object, but you might also want to make other changes on the 3D tabs.

ADDING 2D TEXTART OPTIONS

After you create the text, font, and shape you want, you can adjust the pattern, color, shadows, and so on. Begin by clicking the 2D Options tab to find the following options:

- **Pattern**—You can choose None (you get a solid color), No Fill (you get only text outlines), or one of the patterns displayed on the palette (see Figure W1.42).

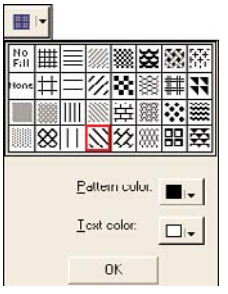

Figure W1.42
You can choose a solid color (None) or transparent text (No Fill), or use a pattern with your TextArt text.

NOTE

If you click the 3D Mode check box, options on the 2D tab are grayed out. Likewise, if the box is not checked, options on the 3D tabs cannot be used.

- **Shadow**—You can click this button to display the shadow palette. You can select the direction and depth of the shadow, as well as the text color and the shadow color.

NOTE

Choosing the right color combination for the text and shadow should be one of your first tasks. Look for colors that complement each other and that make the text readable. Also, if you plan to print to a black-and-white printer, such as a laser printer, choose colors whose grays complement each other. For example, yellow prints as a very light gray, whereas blue and red print nearly black.

- **Outline**—From the outline palette (see Figure W1.43), you can choose the thickness and color of the line that outlines the text. Again, you can change the text color to complement the line color.

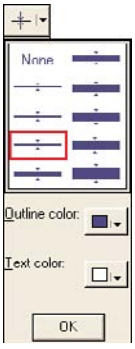

Figure W1.43
You can use the outline palette to choose a line style to go along with your TextArt text.

- **Rotation**—Unlike typical graphic objects that maintain their original shape while rotating, TextArt text skews as it rotates to stay within the graphics box and also to stay within the predefined TextArt shape you chose (see Figure W1.44). You can come up with some very interesting shapes using this option.

Figure W1.44
When you rotate TextArt text, it remains within the graphics box boundaries.

- **Text Color**—If you didn't already choose a color when choosing shadow or outline, you can do so here.
- **Preset**—If you're not feeling particularly creative, or you're in a hurry, you can choose from a limited number of predefined 2D effects.

CAUTION

> If you choose any preset setting, you also lose all your carefully customized settings. Try these presets first, before spending time coming up with your own custom settings.

ADDING 3D TEXTART OPTIONS

You can click the 3D Options tab to display the options available if you choose to display your TextArt in three dimensions (see Figure W1.45). These options, and some of the things you can do with them, include the following:

Figure W1.45
The 3D Options tab enables you to add another dimension to your TextArt text.

- **Lighting**—Lighting 1 and 2 function similarly, but each light source can be a different color, and each can "shine" at the text from a different direction. Click the color palette to change the color, and click the light source palette to choose a direction from where the light comes (see Figure W1.46).

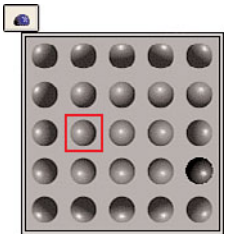

Figure W1.46
The light source palette helps you visualize the direction light comes from as it shines on your 3D text.

- **Bevel**—This option enables you to shape the edge of the text, as if the letters were carved like wood molding. Choose a beveled shape from the palette (see Figure W1.47) to add this effect.

Figure W1.47
You can bevel the sides of 3D text with interesting effects.

- **Depth**—You can use the slider to increase or decrease the depth of the beveled edge.
- **Rotation**—You can rotate the entire TextArt image left or right, up or down, by choosing from several preset rotations (see Figure W1.48).
- **Free Rotate**—If you prefer to rotate the text yourself, click this option, and then use the mouse to drag the TextArt up, down, left, or right.
- **Preset**—Again, if you prefer to let TextArt do the work for you, you can choose from a palette of predefined 3D settings.

Figure W1.48
Preset rotation angles make it easy to rotate 3D TextArt text.

CAUTION

> Don't forget that choosing a preset 3D option cancels all other settings you may have painstakingly set up.

The Advanced 3D Options tab doesn't mean you have more complicated settings but simply that you have more options (see Figure W1.49).

Figure W1.49
The Advanced 3D Options include textures.

Figure W1.50
3D TextArt text is shown here with advanced options.

On this tab, you can change the following settings, some of which are shown in Figure W1.50:

- **Textures**—WordPerfect provides a palette of interesting textures (nuts, tiles, fabrics, wood, and so on) that you can apply to the face of the text, to the beveled edge of the text, or both (see Figure W1.51).

Figure W1.51
These textures can be applied to the face or the side of 3D TextArt text.

- **Texture Size**—Use the slide control to increase (up) or decrease (down) the size of the texture pattern. If you want larger peanuts, for example, slide up. The size control applies to both the face and the bevel if you use textures on both.
- **Texture Lighting**—This option controls the contrast between texture and the Lighting 1 and Lighting 2 colors you selected on the 3D Options tab.
- **Quality**—Unfortunately, this option doesn't indicate how good your TextArt looks but how well it will print on a color printer. DPI refers to the number of dots per inch that print, and bits refers to the richness of the colors you can use, especially for textures and gradient shadings.

USING TEXTART IN DOCUMENTS

WordPerfect places TextArt images inside graphics boxes. As a result, they work like any other graphics box. You can add borders to the box, choose various wrap options, and size or move the box.

If you size the box using the side sizing handles, you also change the shape of the original TextArt.

If you choose to wrap the TextArt box in front of or behind your text, you can make it appear that the TextArt and text are designed to work together.

Figure W1.52 shows how a TextArt image combines with regular text to create a logo.

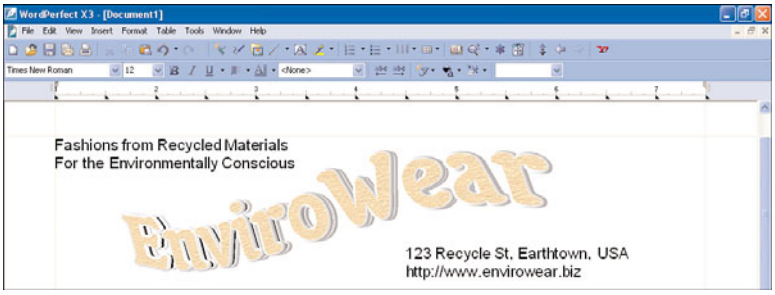

Figure W1.52
TextArt in a graphics box can interact with regular document text to create useful effects.

TROUBLESHOOTING

SELECTING THE CORRECT GRAPHICS BOX

I have several graphics boxes, some sitting on top of others. How can I select just the one I want?

Normally, to select a box you click it once. If there are several boxes, just click again (wait a moment between clicks), and notice that the sizing handles change each time you do. When the sizing handles match the image you want, it's selected. You can also right-click on the stack of images, choose Select Other, and then select the image you want from the list of images displayed.

EXITING THE GRAPHICS EDITING SCREEN

I clicked a graphic, but my screen seemed to go all haywire, with a funny-looking line around the image and a toolbar on the left side of the screen. What happened?

You probably double-clicked the image. Single-clicking selects the image, but double-clicking edits the image. In the case of a graphics box, WordPerfect takes you to the Drawing Editor, hence the different toolbars. To close the Image Editor, click in your text, outside the graphics box. Or you can click the Close button on the toolbar.

ANCHORING IMAGES CORRECTLY

I just used the Make It Fit feature, but now my graphics are all over the place, and they don't fit with the text anymore.

This is one peril of using the Make It Fit feature. If your graphic images are anchored to the page, they remain in place even when the text moves (for example, when you use Make It Fit). You can reduce this problem by anchoring graphic images to paragraphs or characters so that the images move as the text moves. If you have a page with a lot of graphics on it, you could select other contiguous pages and apply Make It Fit just to those pages, thus leaving the graphics page alone. In any case, anytime you use Make It Fit, you need to check your document and perhaps make adjustments to the position of your graphics boxes.

MOVING A ROTATED TEXT BOX

I created a text box and rotated its text, but I can't seem to move the box. Every time I click it, I go to the editing screen.

Selecting a text box that contains rotated text is a bit difficult because in some cases, even when you click exactly on the box border, you enter directly into the Text Box Editor screen. To select such a text box without entering the Text Box Editor, hold down the Shift key and click the box, or right-click the box, and from the QuickMenu choose Select Box. Then, make sure the mouse pointer is at the edge of the box and you see a four-way arrow before you try to drag the box to a new location.

HOW TO GET OUT OF THE DRAW SCREEN

When I edit an image and choose File, Close, WordPerfect closes my entire document. I want to close just the Drawing Editor.

If you click the Close button on the toolbar, WordPerfect closes just the editor. If you choose to use the larger Presentations screen (holding down Alt while double-clicking the image to be edited), the menu is different and you can indeed choose File, Close and return to the document.

GETTING THE TEXTART PROGRAM BACK

When I'm working with TextArt, I seem to lose the TextArt dialog box.

The TextArt program is separate from WordPerfect. When you accidentally switch back to WordPerfect, you hide the TextArt program. Simply double-click the TextArt image to restore the TextArt program dialog box.

CHAPTER W2

Publishing Documents on the World Wide Web

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UNDERSTANDING WEB DOCUMENTS

One of the most interesting phenomena in the past few years has been the development of the World Wide Web, usually referred to simply as the Web. Made possible by the development of the Internet over the past 20–30 years, the Web enables anyone—from large corporations to individuals—to create and publish information that is easily and readily available to anyone anywhere in the world. Today, such phrases as "check out my Web site" or "dot com" are part of our everyday vocabulary.

Part of the success of the Web lies in the basic nature of Web documents. Unlike proprietary word processing formats that require specific word processors to be read, edited, or printed, Web documents are standard ASCII (pronounced "ask-key") text documents that you can create with any common text editor.

At the heart of the Web page is HTML (Hypertext Markup Language), which consists of tags that describe document formatting. This concept should be familiar to WordPerfect users, who are used to seeing formatting codes in the Reveal Codes window. Most HTML tags are used in pairs: one to turn on a formatting feature and another to turn it off. For example, the markup tags used to add boldface to a word look like this:

```
<strong>text in bold</strong>
```

A Web document is placed on a Web server, a computer that does nothing more than honor requests to "serve up," or send, documents to those who want to see them.

Finally, you use a Web browser to view Web pages. When you specify a Web page address, or URL (Uniform Resource Locator), your browser contacts the designated Web server over the Internet and requests a document. The server sends the HTML document to your computer, and then your browser translates it into the attractively functional Web page you see on your screen (see Figure W2.1).

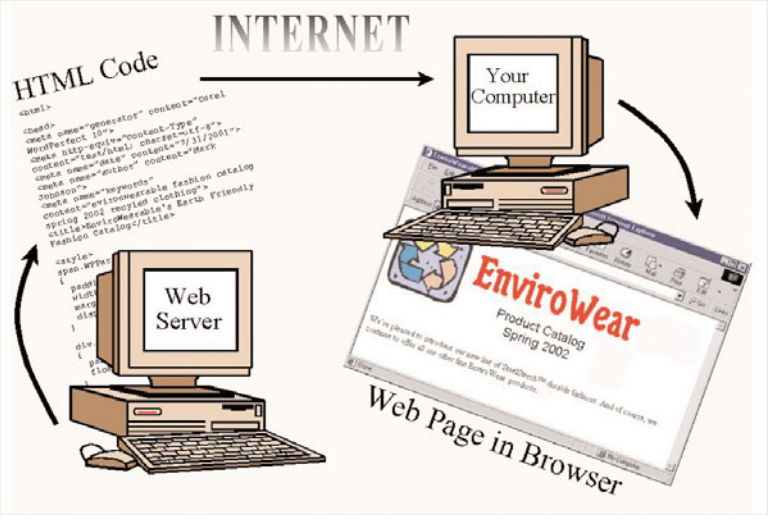


Figure W2.1
Web servers send HTML text documents over the Internet to computers that use Web browser software to view them.

WORDPERFECT AND WEB DOCUMENT LANGUAGES

Since version 7, WordPerfect has included the capability of creating HTML documents. WordPerfect's Internet Publisher Wizard enabled users to create documents using HTML-specific features, such as standard HTML headings, document backgrounds, forms, and even customized HTML code. Further, one could open an HTML page and edit it in WordPerfect.

Unfortunately, standard HTML, although viewable by the largest number of browsers, severely limits the amount of formatting allowed in a document. Today's computer users demand more heavily formatted documents, which has led to changes in the complexity of HTML and the development of other markup languages and methods of publishing Web documents. SGML (Standard Generalized Markup Language) and XML (Extensible Markup Language) are two examples of specialized page languages that use standardized Document Type Definitions to far exceed the simple formatting capabilities of standard HTML. Finally, the use of Cascading Style Sheets (CSS) has emerged as a relatively easy but elegant method of defining the use of nonstandard HTML elements, thus permitting the publishing of documents that look much more like your original word processing documents.

WordPerfect no longer provides the capability to create and edit standard HTML documents. Instead, it enables you to publish your documents as Web pages, converting your formatting using CSS so that the document appears virtually the same on the Web as it does in WordPerfect. WordPerfect also includes the capability to develop Web documents using SGML and XML.

In this chapter, we explore how you can use WordPerfect to create effective and attractive Web documents.

NOTE

> WordPerfect isn't for designing Web sites like you're used to seeing on the Web these days, with flashing graphics and JavaScript-based interactivity. Nevertheless, WordPerfect is quite good at taking standard content pages and converting them into pages that look good on the Web and that fit nicely within a Web site of complex design.

➔ For information on using XML in WordPerfect, **see** Chapter W3, "Working with XML Documents."

PUBLISHING WORDPERFECT DOCUMENTS TO HTML

Publishing a WordPerfect document to HTML is actually quite simple. Just follow these steps:

1. Save your file as a WordPerfect document.
2. Choose File, Publish to HTML. WordPerfect displays the Publish to HTML dialog box (see Figure W2.2).
3. Click Publish. WordPerfect converts your document into HTML code and saves it as a Web page document.

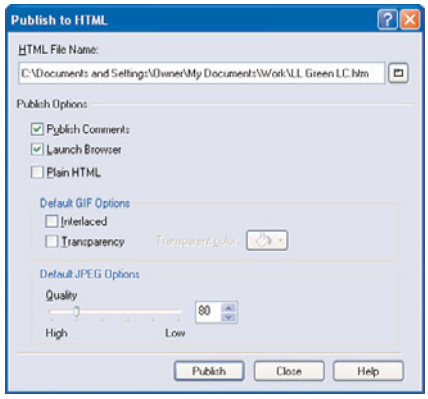


Figure W2.2
Use the Publish to HTML dialog box to choose options prior to publishing your document as a Web document.

Figure W2.3 shows a WordPerfect document, and Figure W2.4 shows the same document as viewed in a Web browser, having been first published to HTML.

NOTE

> We'll save discussion of the Publish to HTML options until later, after we've had a chance to explore how to prepare documents for publication to the Web.

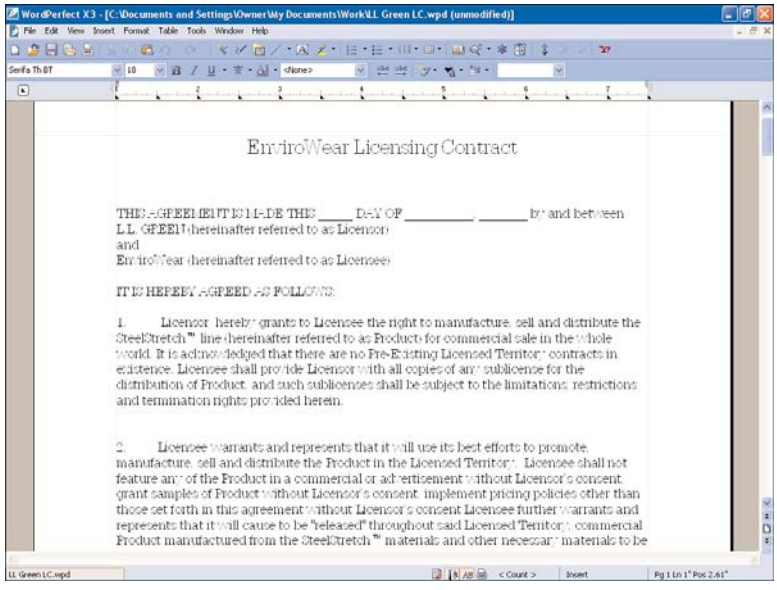


Figure W2.3
A WordPerfect document, ready for publishing to HTML.

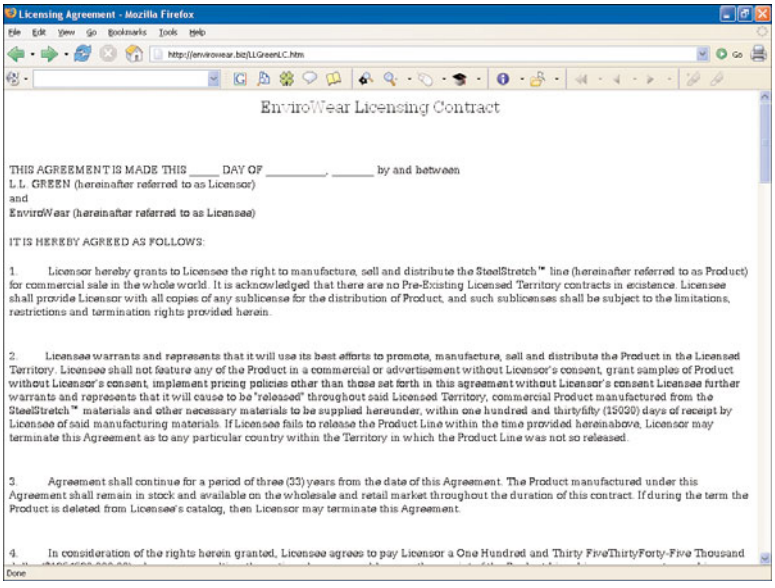


Figure W2.4
A WordPerfect document, published to HTML and viewed in a Web browser.

CONSIDERATIONS IN PUBLISHING DOCUMENTS TO THE WEB

Although the process of publishing to HTML may be simple, there are several things you must consider before publishing a document to the Web:

- **Web Page Format**—WordPerfect provides two powerful, yet significantly different, methods for publishing documents to the Web. One is HTML aided by the use of Cascading Style Sheets, the result of which is shown in Figure W2.4. The other is PDF, the Portable Document Format developed by Adobe Corporation. PDF can produce a more faithful representation of your original WordPerfect document than can HTML, but it does require the use of a special reader. Fortunately, nearly everyone has this free reader already installed.
- **Browsers**—Users must use Web browser software to view Web documents. The most popular browsers are Mozilla's Firefox, Netscape Navigator, and Microsoft Internet Explorer. Other browsers include Mozilla, Lynx, and Opera, and Safari for the Macintosh. Each has its own particular strengths and weaknesses, and preference for one browser over another is usually a matter of personal choice. However, browsers also come in different versions, which further complicates things. For example, older browsers might not support some features, such as Cascading Style Sheets, needed to view your published pages. Finally, browsers often interpret and implement HTML and other standards slightly differently. As you prepare your Web pages, you'll have to consider whether your readers will have the appropriate version, or if they can easily obtain it. Fortunately, the latest versions of the most commonly used browsers display WordPerfect HTML pages very well.

- **Platform**—Part of the attractiveness of publishing to the HTML standard is that Web documents can be viewed by browsers on a variety of computing platforms (for example, Windows, Macintosh, or UNIX systems) and still look the same. Nevertheless, there are some differences among these platforms, and you need to test your pages on those systems that your readers are likely to use.
- **Screen resolution**—Most users these days view Web documents at the SVGA (Super VGA, or 800 × 600) or XGA (1024 × 768) screen resolutions. But some still have older systems and use a lower resolution of only 640 × 480. Some advanced users view Web pages on their Personal Digital Assistants. You want to be sure that it's easy for readers to read the information on your Web pages regardless of the screen resolution they use.
- **Fonts**—Unless users have the same fonts on their computers as you do on yours, you might be limited to a few basic font styles. Consider whether a specific font is important to you.
- **Accessibility**—Some users come to your Web site with visual disabilities and you need to consider whether your pages can be understood by the special readers they use. Some of the procedures discussed in this chapter address this issue specifically.
- **Plug-ins**—A plug-in is an addition to a Web browser that adds functionality, such as the capability to display animations or video, play sound, or read certain non-HTML information. If your audience is not very computer literate, requiring viewers to download and install plug-ins might not be worth the trouble.

As you prepare your documents for publication to the Web, keep these considerations in mind.

PREPARING DOCUMENTS FOR THE WEB

Many of the formatting features and procedures you use in a WordPerfect document can also be used as you create a Web page. However, the more difficult task might be to learn what you *can't* use, and to create effective documents within the limitations imposed by HTML.

PREVIEWING A WEB DOCUMENT

As you prepare your document, you can quickly preview how it will look in your favorite Web browser. That way, you can easily make adjustments before taking the more formal step of publishing your document.

To preview how a WordPerfect document will look in a Web browser, follow these steps:

1. Save your work.
2. Choose View, Preview in Browser. WordPerfect opens your default Web browser (for example, Firefox) and displays your document as if it were a Web document (refer to Figure W2.4).

3. Switch back to WordPerfect and make any changes you want.
4. Repeat steps 1–2 to view the changes.

NOTE

When you preview a document in your browser, WordPerfect makes a temporary copy of the HTML file named wpdoc.htm, usually located in your system's temporary folder (for example, c:\Documents and Settings\Owner\Local Settings\Temp).

TIP

You can quickly switch from your browser's preview back to your document by pressing Alt+Tab.

TIP

Because you need to preview your document in more than one browser, open your second browser (for example, Netscape) and choose File, Open (or Open Page) and type the location of the wpdoc.htm file (for example, **c:\Documents and Settings\Owner\Local Settings\Temp\wpdoc.htm**). Then use Alt+Tab to switch from one browser to another, or back to WordPerfect. Don't forget that while in WordPerfect you must choose View, Preview in Browser to update the page in your default browser, and that you need to click the Refresh, or Reload, button in any other browser you may use.

SETTING DOCUMENT PROPERTIES

When you open a Web page in your browser, typically you see a descriptive title of the page in the title bar (for example, the blue bar at the top of the screen). This title helps you get a quick idea of what the page is all about, but it's particularly useful to those using screen readers because they can't otherwise quickly scan the page. Further, the words in a Web page title often become the keywords used to locate documents by Web search engines such as Yahoo!, Google, or AltaVista.

To set document properties for your Web page, follow these steps:

1. Choose File, Properties. WordPerfect displays the Properties dialog box (see Figure W2.5).
2. In the Descriptive Name text box, type the title you want to appear on the Web browser's title bar. Make it relatively short but as descriptive as possible. If you don't include anything here, the browser simply shows the page's URL. For example, "EnviroWear's Earth Friendly Fashion Catalog" will be much more helpful to the viewer than http://www.envirowear.biz/springcat05.html.
3. In the Keywords and Abstract text boxes, add a few significant keywords, and if you want, a short abstract of the document.
4. Click OK to return to your document.

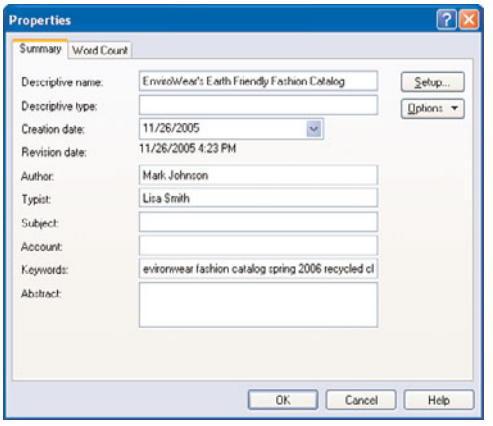


Figure W2.5
Use the Properties dialog box to set the title and other key information for your Web page.

When you preview the document, the title now appears in the title bar (see Figure W2.6).

Figure W2.6
Descriptive names created in the Properties dialog box appear in the Web browser's title bar.

Although you don't see it, the HTML source code now includes keywords and descriptions used by search engines to make your document easier to find (see Figure W2.7).

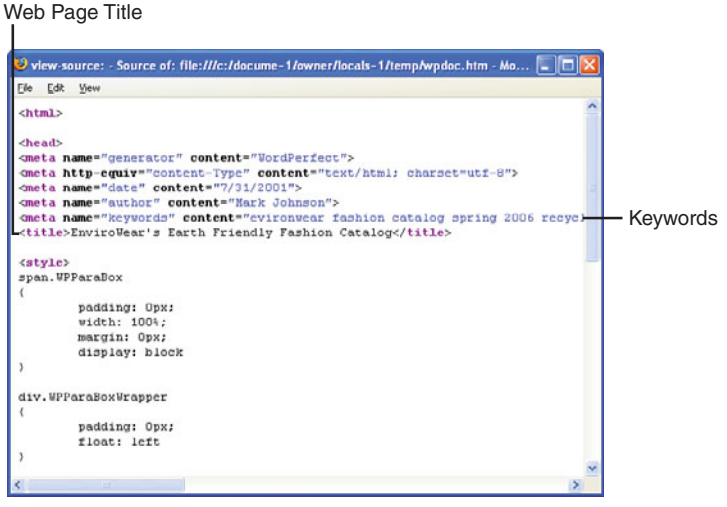


Figure W2.7
WordPerfect inserts keywords and abstracts into the Web document's source code.

NOTE

> The source code for Web documents is plain text and can be viewed in any text editor.

WORKING WITH TEXT

By default, WordPerfect Web documents appear with a white background and black text, the same as what you see in WordPerfect. You can't change the background unless you go to another Web page editor and add the necessary background color codes.

You can set a fill color (by choosing Format, Page, Border/Fill) but the results won't be what you expect. For example, a page filled with yellow in WordPerfect still shows a white border in the margins, but only for the equivalent of the first WordPerfect page. WordPerfect also converts all fill patterns and gradient shading to solid colors.

NOTE

> If you choose a textured or gradient fill, WordPerfect combines the foreground color with white, resulting in a solid pastel color.

➔ To learn how to manipulate background fills and colors, **see** "Adding Borders, Drop Shadows, and Fills," **p. 183**.

Text alignment varies somewhat from what you're used to seeing in WordPerfect. For example, all tab types display properly in Web browsers—even right or centered tabs, with or without dot leaders. However, HTML and WordPerfect permit only one space at a time—multiple spaces are reduced to just one space (see Figure W2.8).

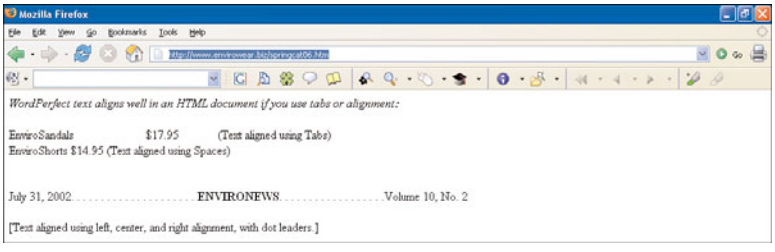


Figure W2.8
WordPerfect's alignment features work well in Web pages, except that you're limited to using one space at a time.

Paragraph formatting and alignment also reproduce well on the Web. For example, you can use First Line Indent (Tab), Indent (F7), Double Indent (Ctrl+Shift+F7), or Hanging Indent (Ctrl+F7).

You can also align text with Left, Right, Center, and Full justification. However, All does not work—the text remains left justified.

➔ For information on text formatting, **see** Chapter 7, "Formatting Lines and Paragraphs," **p. 171**.

WORKING WITH FONTS

Standard HTML provides for the use of only three basic fonts: a sans-serif font such as Arial, a serif font such as Times Roman, and a monospaced font such as Courier.

➔ For more information on using fonts, **see** "Choosing the Right Font," **p. 62**.

However, with the aid of Cascading Style Sheets, WordPerfect can use nearly any font and display it properly in the Web browser (see Figure W2.9).

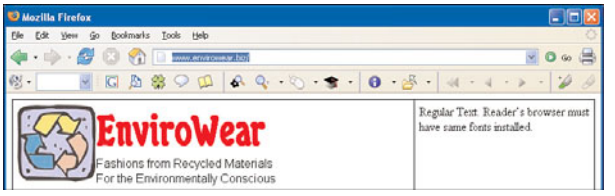


Figure W2.9
You can use nearly any font in your WordPerfect Web page document, and it will display in the Web browser if the browser's computer also has the same fonts.

The only catch is a fairly significant one—the computer on which the Web page is viewed must also have the same font(s) installed. If it doesn't, the Web browser automatically chooses an alternative (usually Arial, Times, or Courier) to approximate the basic style of the Web page font.

If you need a specific font for a title or letterhead, for example, you can try these options:

- **Create the text in the Draw program**—Choose Insert, Graphics, Draw Picture, and then use the Draw tools to create a text image. Copy the image while in the draw program, return to WordPerfect, and then paste it into the document. If instead you just return from Draw, WordPerfect inserts the entire editing area into your document, including lots of white space. Text created this way is somewhat difficult to manage in terms of size and position, but fonts and colors are usually quite true to the original.
- **Create the text as a graphic image using TextArt** —If you want more options for the final look of the text, this feature works well. Note that colors don't always translate well from TextArt images to the Web. However, such images are easier to size and position than those created in Draw.
- **Create the text in any graphics program and save it in any file format (for example, JPG or PCX)**—Then, insert the image into your document just as you do any other graphic. This method is useful if you want to use the graphic over again, and depending on the graphics program you use, it might give you more control over the final look of the text.

NOTE

> Although WordPerfect text boxes are positioned and otherwise act like graphics boxes, the contents are still text, and thus the use of fonts is still limited by what's available in the user's browser.

➔ To learn how to create text as graphics, **see** Chapter W1, "Creating TextArt," **p. Web:30**.

Standard HTML uses special heading styles to designate sections and subsections of a document. Such headings are distinguished by bold, larger text. Neophyte Web page creators sometimes mistakenly use these headings to emphasize text, when they actually should be used to give structure to the document. Screen readers, in particular, key on these structural elements to help blind readers navigate through documents.

WordPerfect has no equivalent structural style. The heading styles in WordPerfect don't look anything like HTML heading styles, nor do they lend structure to a Web page (see Figure W2.10). Nevertheless, you can use WordPerfect's Heading styles to automatically generate a linked Table of Contents, as described in the "Using Hyperlinks" section later in this chapter.

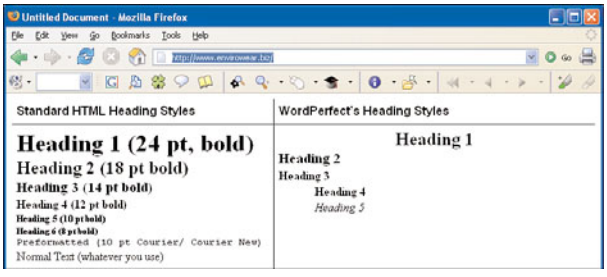


Figure W2.10
HTML heading styles aren't anything like WordPerfect's heading styles.

You can create styles that simulate HTML Headings following the specifications in Table W2.1 (refer also to Figure W2.10).

NOTE

> When choosing a font size, whether in a style or in regular text, you should use Relative Size instead of a fixed-point size. Although the font sizes listed in Table W2.1 typically translate from 24 points for Extra Large to 8 points for Fine, browsers sometimes interpret fonts based on a base font that might be larger or smaller than the typical 12-point normal font size.

TABLE W2.1 HTML HEADING EQUIVALENTS IN WORDPERFECT

HTML Style	WordPerfect Style
Heading One	Bold, Extra Large
Heading Two	Bold, Very Large
Heading Three	Bold, Large
Heading Four	Bold, Normal
Heading Five	Bold, Small
Heading Six	Bold, Fine

➔ To learn how to create styles and to use them in all of your Web or other documents, **see** Chapter 9, "Formatting with Styles," **p. 223**.

➔ For information on using WordPerfect's Heading style to generate a linked table of contents, **see** "Using Hyperlinks," later in this chapter.

USING OUTLINES AND BULLETS

Bullets and numbered lists are important tools for organizing information in any document. Since the inception of HTML, both bullets and outlines have been standard HTML features.

To create a bulleted list that looks like a typical Web page bulleted list, follow these steps:

1. Choose Insert, Outline/Bullets and Numbering. WordPerfect displays the Bullets and Numbering dialog box.
2. Click the Bullets tab.
3. Click the Bullets style. There are several bullet styles shown but only one that is named Bullets (see Figure W2.11).
4. Click OK to return to your document to begin using the Bullet style.

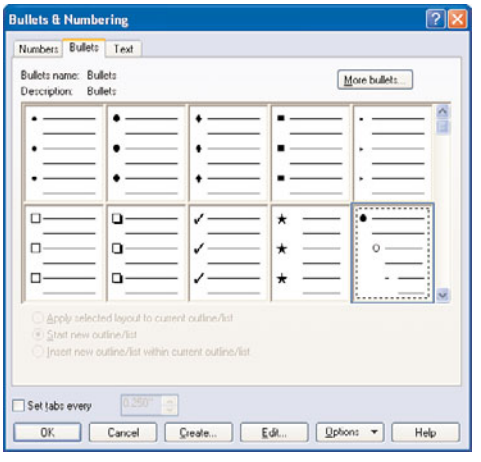


Figure W2.11
The Bullets style in WordPerfect's Bullets & Numbering dialog box is nearly equivalent to standard HTML bullets.

Use normal WordPerfect methods for creating outlines: Type text and press Enter to get a new bullet. Before typing text, press Tab to move to the right for a lower-level bullet; or press Shift+Tab to move to the left for a higher-level bullet.

➔ To learn more about creating outlines using bullets or numbers, **see** Chapter 11, "Organizing Information with Lists and Outlines," **p. 283**.

To create a numbered outline, follow the same procedures as previously described for a bulleted list but instead choose an outline style. By default, HTML outlines use Arabic numerals, but the implementation of true outlining is impossible in standard HTML code. WordPerfect, on the other hand, can create correctly formatted numbered outlines. (See Figure W2.12, which shows both standard HTML and WordPerfect outlines.)

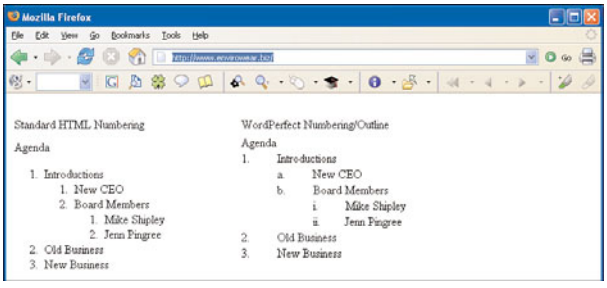


Figure W2.12
WordPerfect enables you to create real numbered outlines, unlike standard HTML, which can create only numbered lists.

USING COLLABORATION TOOLS

Considering the ease with which you can publish your WordPerfect documents to a company intranet, it would seem logical that you could use WordPerfect's collaboration tools to post documents for comment or review. Unfortunately, what you can do with collaborative markups is quite limited, and even then, those who view your Web documents can't interactively revise them. Nevertheless, markups normally used for collaboration can be effective in highlighting and presenting supplementary information.

Some tools, that normally generate markup text automatically in WordPerfect don't work when creating documents for the Web. For example, if you want to display strikeout text, you must select the text and apply the strikeout attribute in the Font Properties dialog box. For Redline text, you must select it and change the font color to red. Likewise, you can select text and apply highlighting colors to give the effect of being marked with a colored highlighter. (See Figure W2.13, which shows several types of markups.)

One collaborative tool that is quite nicely implemented and that can be quite useful for presenting supplementary material is the Comment feature. Simply position the insertion point where you want the comment, and then choose Insert, Comment, Create. Create the comment, including name, initials, date, or time, and then close the Comment editing screen. On your Web document, a small comment bubble appears. When the reader clicks it, a window appears to display the contents of the comment (see Figure W2.14).

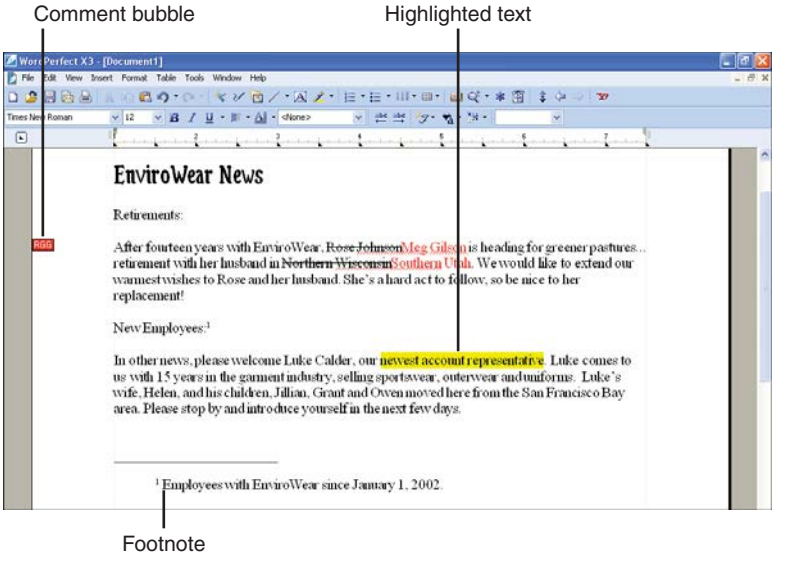


Figure W2.13
Although you can manually mark up text in WordPerfect and display those marking in Web documents, true automatic or collaborative markup is very limited.

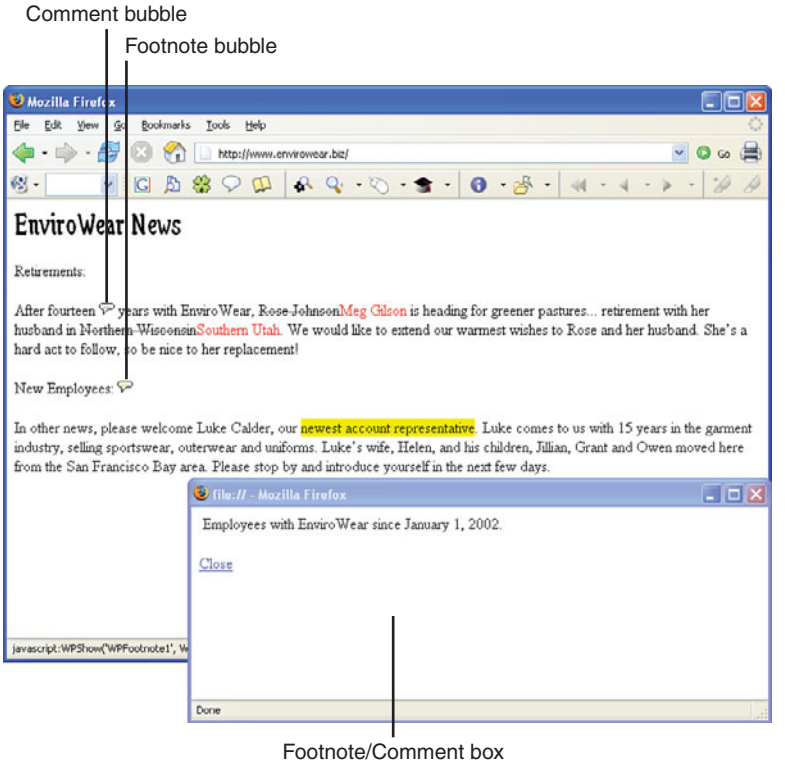


Figure W2.14
WordPerfect comments are used in HTML documents for comments and for footnotes or endnotes.

Footnotes convert to Comments, instead of appearing as linked footnote/endnote numbers and jumping to a separate footnote/endnote area (refer to Figure W2.14). Comment bubbles are white, whereas Footnote/Endnote bubbles are yellow.

NOTE

> When you publish your document, you have the option of publishing comments. The default is to include comments.

WORKING WITH GRAPHICS

Early Internet information systems such as Gopher relied entirely on text. One of the features that helped vault the World Wide Web to its current pre-eminence is its capability to include visual images in Web documents.

WordPerfect can neatly integrate text and graphics to present information more powerfully than was possible with plain-text documents. To insert a graphic image in a WordPerfect Web document, simply use whatever method you normally use to insert clip art or images from files.

However, the fine-tuned control one has over graphics in WordPerfect is largely lost in typical HTML documents. Graphic images can be left or right justified, but any other positioning is difficult to manage with any precision. The following are some of the options and considerations for positioning graphic images on your Web page:

- By default, WordPerfect anchors graphic images to a paragraph. However, both page-anchored and paragraph-anchored images behave the same in a WordPerfect Web page.
- If you drag a page- or paragraph-anchored image to any position to the right of center, it ends up flush with the right margin. Anything positioned to the left of center appears flush with the left margin (see Figure W2.15).
- Vertically, the top of the image aligns with the top of the paragraph in which it's located in both page- and paragraph-anchored graphics.
- Text wraps around both page- and paragraph-anchored graphic images.
- Character-anchored images appear at the same horizontal location as the character to which they're attached.
- Text does not wrap around character-anchored images, unless you have vertically centered the image on the anchor character. Instead, WordPerfect inserts a blank space between the lines of text to accommodate the image (refer to Figure W2.15).
- Most other options found in the Box Position dialog box have little or no effect on where the image appears on the Web page.

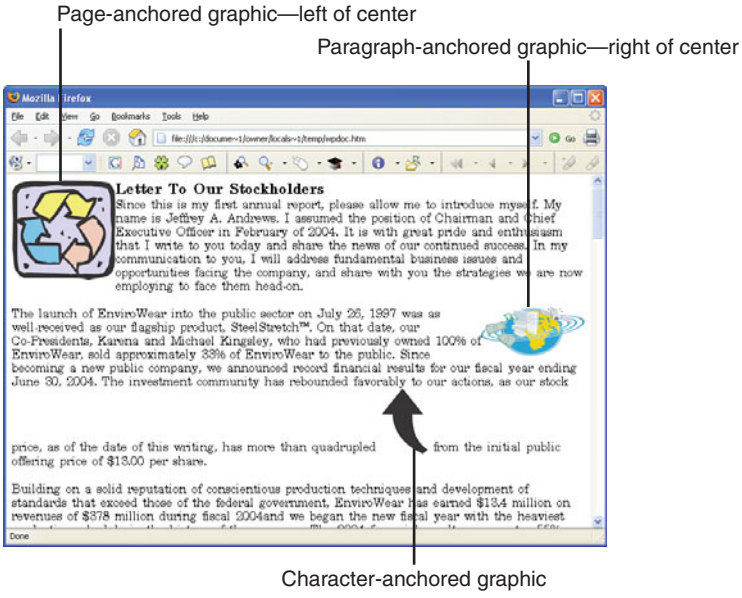


Figure W2.15
You're limited to left and right alignment of page- or paragraph-anchored graphic images. WordPerfect inserts blank space between text lines to accommodate character-anchored images.

CAUTION

Be sure to test pages that contain graphics in various browsers and platforms to make sure the results are what you want. For example, a lower-resolution screen wraps the text to fit in the narrower screen margins, but the page-anchored images still appear at the right or left.

TIP

You might have some success in positioning an image by anchoring it to a character and using Tab to move it to the right. Remember, however, that the real position can vary from browser to browser.

You can insert nearly any type of graphic image into your document, and when you publish your document to HTML, WordPerfect converts the images into one of two accepted formats, JPG or GIF. For example, although WPG (WordPerfect) graphics cannot be viewed in browsers, you can choose to convert them to GIF images, which browsers can understand.

NOTE

JPG stands for Joint Photographic Experts Group and is pronounced jay-peg. GIF stands for Graphics Interchange Format, developed by CompuServe, and is pronounced GIF (as in gift) or JIF (as in jiffy), depending on your preference.

WordPerfect also uses special styles to attach graphics box captions to images (see Figure W2.16). If you've ever considered creating captions in standard HTML, you can just sit back and be amazed that WordPerfect accomplishes this impossible task so elegantly.

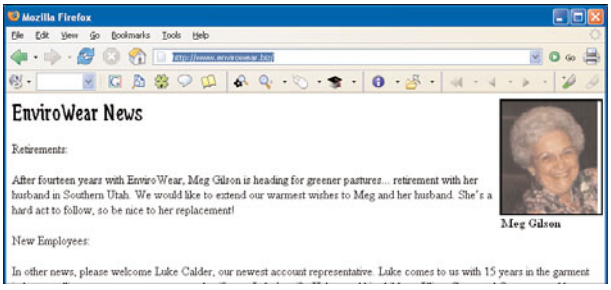


Figure W2.16
WordPerfect even attaches graphics box captions to images when you publish them to HTML.

➔ To learn more about adding captions to graphics boxes, **see** Chapter W1, "Making WordPerfect Text Work with Graphic Objects," **p. Web:2**.

The final step in preparing graphic images for the Web is to set their properties. Right-click an image and choose HTML Properties. WordPerfect then displays the HTML Properties dialog box (see Figure W2.17).

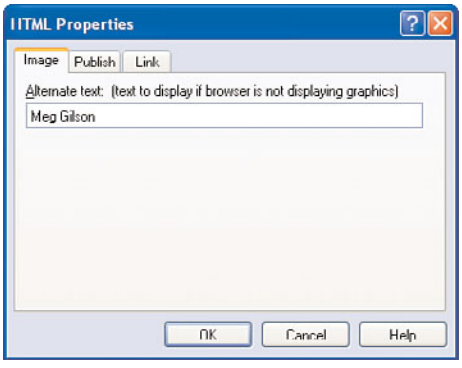


Figure W2.17
The HTML Properties dialog box lets you add Alternate Text and hyperlinks to an image and specify its graphic format.

NOTE

> You can access the HTML Properties box *only* by right-clicking the image and selecting from the QuickMenu. The option does not appear on any other menu or toolbar.

In the HTML Properties dialog box you find these options:

- On the Image tab, you can add Alternate Text. This is the text that displays if users have graphics turned off in their browsers. Perhaps more importantly, it's the text used by screen readers to tell blind readers what the graphic image is all about. Don't simply use "Picture" or "Logo." Use more descriptive phrases such as "The EnviroWear Logo" or

"John Smith receiving his retirement award." You need not include "Image of…" or "Link to…" because screen readers automatically include that information when reading the Web page.

- On the Publish tab, you can specify the format to which the graphic image is to be converted. By default, WordPerfect uses the GIF format, but you can also select the JPG format.

NOTE

> Which graphic format is better for publishing to the Web? If your image consists mostly of line art, with mostly sharp edges and few colors, the GIF format usually is better. However, if the image has photo-like characteristics, with broad tonal ranges, the JPG format is preferred. However, either format generally will do the trick. JPG images sometimes are slightly smaller and thus download more quickly than GIF images.

- On the Link tab, you can specify a bookmark or another Web document to which you can link the image. See the next section for a more complete description of how to link graphic images.

If you're like me, creating just the right graphic image for Web pages isn't an option because we just don't have the necessary artistic skills. Fortunately, there are plenty of resources for good graphic images, including the following:

- **WordPerfect's clip art**—WordPerfect ships with more than 10,000 clip art images.

➔ For information on finding and adding these images to your Web page, **see** Chapter 12, "Adding Graphics to Your Documents," **p. 307**.

- **Images you modify using Corel Presentations**—Although you might not find exactly the image you want as a clip art image, you should look at each clip art image as a collection of images. For example, you want a pair of blue jeans. None of the images are of just blue jeans, but one of the images shows a teenager wearing blue jeans. You can use Presentations to edit the image, removing everything except what you want. You then save just the image as its own WPG graphics file.

➔ For information on manipulating and customizing clip art images by using Presentations, **see** "Editing WordPerfect Graphics in Presentations," **p. 795**.

- **Images you create using Corel Presentations**—If you have a specific layout of graphics and text that you can't seem to replicate in a WordPerfect Web page, you can create the layout in Presentations, and then group the objects in the layout and save them as an image that you then can insert into your Web page.

  You can save Presentations graphics in the standard WordPerfect (WPG) format or use Save As to save them as GIF or JPG images. The key is to select the image first and then save just the image, not the entire Presentations drawing screen.

NOTE

Text portions of drawings created in Presentations do not always convert properly when published to HTML. You should experiment but don't waste a lot of time trying to make text work when it simply will not do so.

- **Images from other Web sites**—Often, while browsing the Web, you find just the image you'd like to use on your Web page. Capturing and using graphic images from other Web sites is quick and easy. Simply right-click the image in your browser, and from the QuickMenu, choose the option that enables you to copy the image. Then, paste the image into your WordPerfect document.

CAUTION

Just because you can capture an image from the Web doesn't mean that it's legal to do so. Copyright laws apply to published materials on the Web, just as they do to printed materials. If you have questions about whether you can use an image, you should contact the owner of the Web page and ask permission.

TIP

Many Web sites provide collections of free clip art, including graphic lines, buttons, bullets, and more. You can use any search engine, such as Google or Yahoo!, to find such clip art sites.

Sizing Web page graphics can affect the quality of the graphic when it's displayed in a Web browser. In particular, bitmap graphics, such as GIF and JPG, distort or degrade badly unless they appear in their original size, displaying what is sometimes called "the jaggies" or jagged, blocky-looking chunks in place of smooth graphics. WPG graphics can be sized any way you like because they don't convert to bitmap graphics until you publish the Web page to HTML.

To ensure that a bitmap graphic remains at its proper size, follow these steps:

1. Select the graphic image.
2. Right-click the image and choose Size from the QuickMenu. WordPerfect displays the Box Size dialog box (see Figure W2.18).
3. Choose Maintain Proportions for both the width and height, and click OK.

If you then find that the image is too large or too small, you have no other option but to risk degradation by changing its size or re-creating the bitmap image in the proper size.

TIP

If you save a Corel Presentations graphic image as a GIF or JPG file, try to specify the exact dimensions you need so you won't have to degrade the image after inserting it into your WordPerfect Web page document.

Figure W2.18
You can use the Box Size dialog box to allow graphic images to display proportionally.

USING HYPERLINKS

The real power of the World Wide Web lies in the reader's capability to follow hyperlinks (usually referred to simply as links) to quickly jump from one location to another. Whether people who visit your site jump to another spot within the same Web document, to another document at the same Web site, or to an entirely different Web site anywhere else in the world is all the same.

➔ For complete information on creating hyperlinks, **see** "Creating Hypertext Links," **p. 448**, and "Creating Links to the Internet," **p. 454**.

The methods for creating links in a Web document are identical to those described in Chapter 17, "Interactive and Multimedia Documents." Consider the following:

- You can create links from text or graphics objects. The user jumps by clicking on the text or object.
- Internal links enable a reader to jump to another location in the same document. You first create bookmarks and then create links to those bookmarks.
- External links enable a reader to jump to another Web document, either one of yours or anywhere else on the Web.

  Typical external links include the following:

  - Links to a URL using the http:// protocol (for example, http://www.envirowear.biz)
  - Links to an e-mail address using mailto: (for example, mailto:sales@envirowear.biz)
  - Links to an FTP site to download a file (for example, ftp://supportfiles.envirowear.biz)

To add a hyperlink to text, simply select the text; choose Tools, Hyperlink; in the Hyperlink Properties dialog box, specify the target document or bookmark.

TIP

Don't forget that WordPerfect's QuickLink feature enables you to create a text link simply by typing a URL, an e-mail address, or an FTP site, followed by a space.

NOTE

The Target Frame option is designed to enable you to specify which frame of a Web page frameset will display a link when clicked. The Web document you create with WordPerfect must be one of the frames of the Web page frameset. However, the actual frameset Web page (for example, index.htm) must be created with a text editor such as Notepad, or a Web page editor. WordPerfect cannot create frame-based Web pages.

TIP

Although intended to be used with frame-based Web pages, the Target Frame option can be used to open a new instance of the browser, leaving the original copy of the browser open displaying the original WordPerfect page. Simply supply any name in the Target Frame text box.

You can also create links to graphic images. Suppose, for example, you want to display a gallery of your newest EnviroWear fashions, but you also want the reader to have complete information about each of the items in the gallery. Instead of presenting the pictures and descriptions all in one location, you can hyperlink the graphic image of the product to another location in the document that fully describes the product.

To link an image, follow these steps:

1. Create the target bookmark or determine the location of the target document.
2. Select the image to which you want to add a link.
3. Choose Tools, Hyperlink. WordPerfect displays the Hyperlink Properties dialog box (see Figure W2.19).

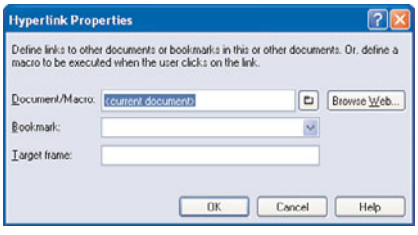


Figure W2.19
You can use the Hyperlink Properties dialog box to link not only text but also graphic images.

4. Specify the target bookmark or document and click OK.

Although the graphic image is now linked to a target, WordPerfect does not add any visual markers to the graphic to let you know it is linked. However, when viewed in a browser, the mouse pointer becomes a hand to indicate the image is linked.

CAUTION

> After you add a hyperlink to an image, you can edit or change the link, but you cannot easily remove it. To remove a link, you must activate the Hyperlink Tools toolbar and click the Hyperlink Remove button. Otherwise, you must delete the graphic image and insert it again.

Although the procedure for creating links is relatively simple, remember that you must organize your document in such a way that the reader doesn't get lost after clicking a hyperlink. You need to include more navigational aids, such as a main menu or table of contents, and additional hyperlinks throughout the document that enable the reader to jump back to the main menu.

Although you can create a text menu and add hyperlinks that jump to various sections of your document, you can also use WordPerfect's heading styles to help generate a table of contents. To create an automatically linked table of contents, follow these steps:

1. Mark each section with an appropriate heading style. (Refer to Figure W2.10, which shows what each of WordPerfect's heading styles looks like.)
2. Position the cursor where you want the table of contents to appear, typically somewhere near the top of the document. You might even type **Table of Contents** and mark it as a major heading.
3. Choose Tools, Reference, Table of Contents. WordPerfect displays the Table of Contents tab (see Figure W2.20).

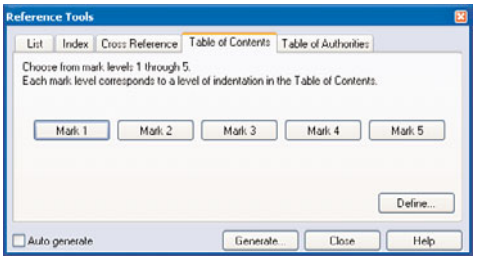


Figure W2.20
The Table of Contents toolbar displays buttons for defining and generating a table of contents.

4. Click the Define button on the Table of Contents tab and WordPerfect displays the Define Table of Contents dialog box (see Figure W2.21).
5. Indicate the number of levels of heading styles you have used. (Indicate "5" if you're not sure.) The numbering style doesn't matter. Click OK.
6. Click the Generate button on the Table of Contents dialog box. WordPerfect displays the Generate dialog box (see Figure W2.22).

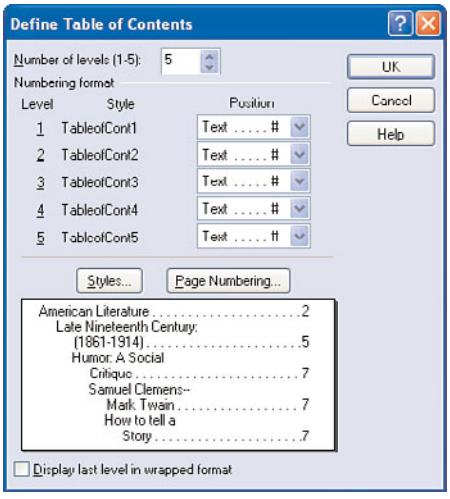


Figure W2.21
Use the Define Table of Contents dialog box to indicate how many heading style levels you want to include in your table of contents. Choosing a particular style is not important.

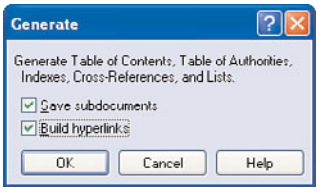


Figure W2.22
Select the Build Hyperlinks option in the Generate dialog box so that WordPerfect can automatically create a hyperlinked table of contents.

7. Be sure the Build Hyperlinks box is checked and then click OK.

WordPerfect automatically generates a table of contents as shown in Figure W2.23. However, when you publish the document to HTML, the table of contents appears as shown in Figure W2.24.

Getting from the table of contents to various sections of the document is one part of the navigation process. The other is getting back to the table of contents, or top of the document. One particularly useful tool for doing this is the Graphics Shapes option, which enables you to insert action buttons that serve as navigation tools for the reader. To create a hyperlinked action button, follow these steps:

1. Choose Insert, Shapes to display the Draw Object Shapes dialog box.
2. Click the Action Buttons radio button.
3. Click the shapes palette to see a selection of action button types (see Figure W2.25).

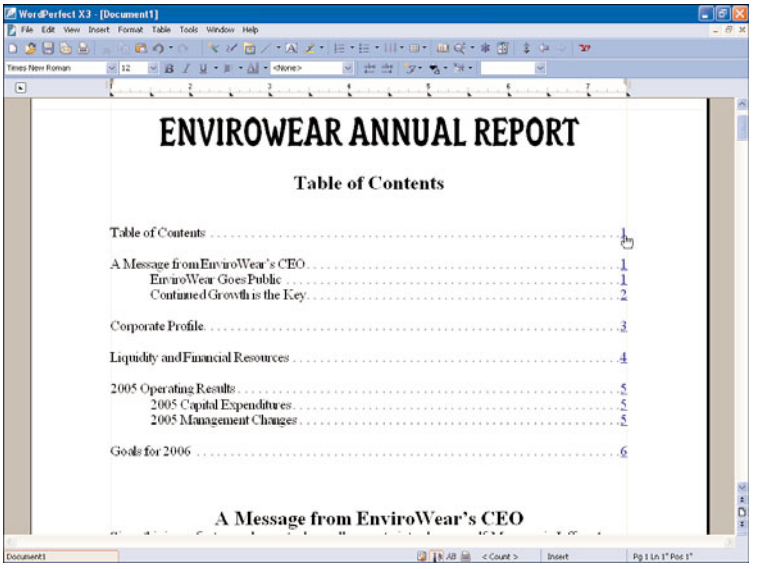


Figure W2.23
A WordPerfect table of contents uses the style you choose and adds hyperlinks only to the page numbers.

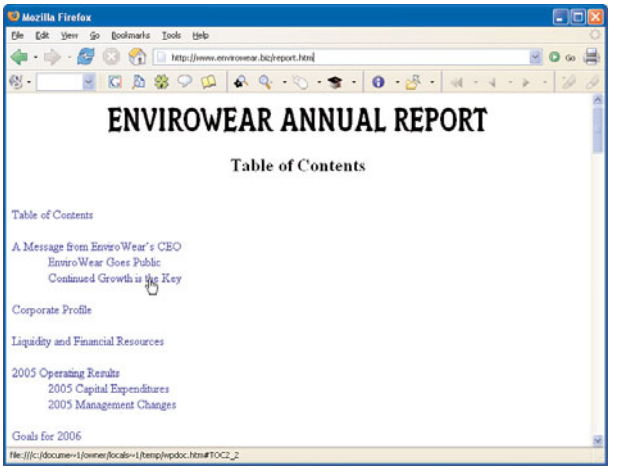


Figure W2.24
When published to HTML and viewed in a Web browser, a WordPerfect table of contents appears as hyperlinked section headings without page numbers.

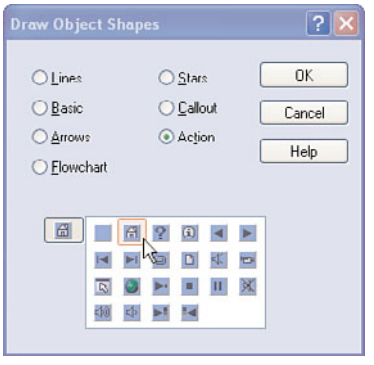


Figure W2.25
Action button shapes can be quite useful for navigating a Web document when used with hyperlinks.

4. Choose the button type you want, and click OK.
5. In the location where you want the button, click and drag to create the size and shape button you want.
6. With the button still selected, choose Tools, Hyperlink, and select the target bookmark or document.
7. Click OK to add the hyperlink to the action button.

TIP

Don't forget that you can easily change the color and other properties of an action button. Simply right-click the button and choose Properties.

Some readers like the visual cues that action buttons provide. But others prefer textual cues. Consider adding hyperlinked text—for example, **Return to the Main Menu**. Then, with the action button selected, access the Graphics Position dialog box to anchor the action button to a character, and position the image so that the button aligns with the bottom of the text (see Figure W2.26).

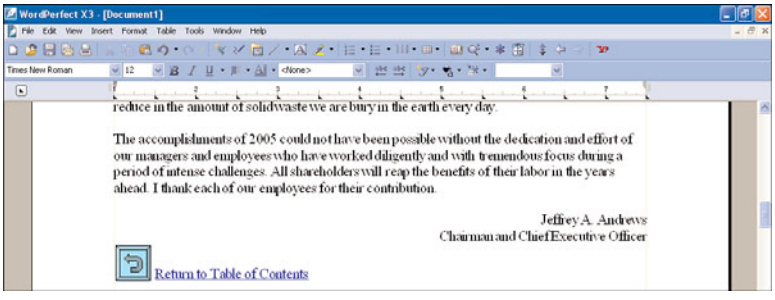


Figure W2.26
Navigation links from inside a document back to the top or to a main menu help readers avoid having to read a document sequentially from beginning to end.

NOTE

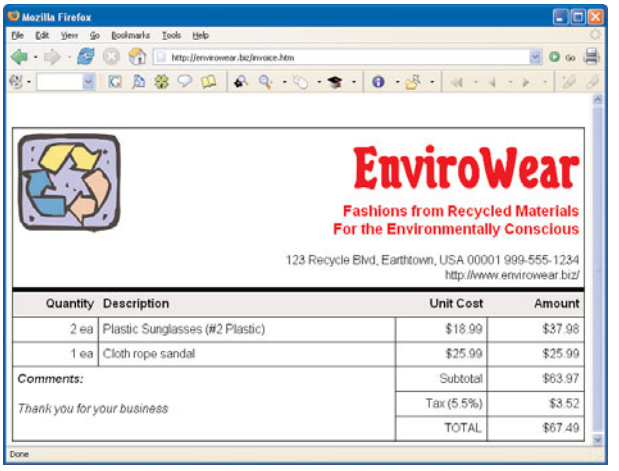
Don't forget that blind readers need navigation assistance, too! For graphic images, be sure to add alternative text in the HTML Properties dialog box by right-clicking the button and choosing HTML Properties.

WORKING WITH TABLES

Tables can help you organize and effectively present information on your Web pages, just as they can in any document. Consider the table in Figure W2.27, which shows how several different table options appear in a browser.

➔ To learn more about using various table features, **see** Chapter 10, "Organizing Information with Tables," **p. 247**.

Figure W2.27
A WordPerfect table as displayed in a browser.



When using tables, consider the following as they apply to the most recent versions of Netscape or Internet Explorer. How tables display in other browsers, including older versions of Netscape and Internet Explorer, may vary.

- Table lines appear as they do in WordPerfect, including lines of varying thickness.
- Changes in column width display properly in both browsers. Changes in Row Height display only in Internet Explorer, unless such changes are the result of expansion to accommodate text.
- By default, WordPerfect tables are fully justified. Thus, the Web version also extends from margin to margin, regardless of the size of the browser screen. Columns shrink or expand proportionally to fit the table into the screen. However, if you change the table format to left, center, or right justified, the table width remains fixed, extending beyond the edge of the browser screen if the table is too large to fit.
- Table borders don't always appear in browsers the way they do in WordPerfect, especially the fancier line styles. Some table borders replicate perfectly.
- Cell colors, or backgrounds, display in solid colors only. Gradient shading or patterns are converted to a solid color.
- Math formulas do not function in tables published to HTML, although the text of the numeric values does appear.
- Most other table features do not convert to HTML, such as skewed cells, rotated text, or diagonal lines.

TIP

You can use a table to simulate text columns on a Web page. For example, to create a two-column format, you create a table with only one row and two columns. You place all the text for the first column in cell A1 and the text for the second column in B1. You then format the table so that it does not display table borders.

CAUTION

Certain screen readers for the visually impaired read tables horizontally, row by row. If you use tables, consider whether the flow of information in them will make sense to all visitors to your Web page.

PUBLISHING TO HTML

The moment of truth has arrived. You've worked long and hard to get your Web page ready, and now it's time to put it on a Web server for the world to see.

The steps for publishing your document to HTML are quite simple, with relatively few options. Follow these steps:

1. Do a final check of your document for content (spelling, for example) and layout (are things where they're supposed to be?). Check links in your browser. Do they jump where they're supposed to?
2. Save your WordPerfect document one last time.
3. Choose File, Publish to HTML. WordPerfect displays the Publish to HTML dialog box (see Figure W2.28).

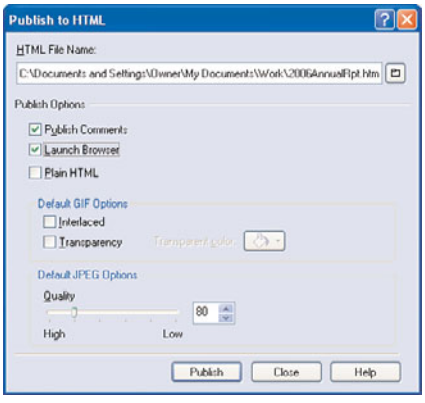


Figure W2.28
Publishing a document to HTML is quite simple, using the Publish to HTML dialog box.

4. Type the name of the Web page, ending it with .htm or .html, both of which are the required filename extensions for Web documents.
5. Choose from the following options:
   - **Publish Comments**—If you want readers to see document comments, leave this box checked. A small bubble icon appears on the Web page for each comment, and the reader clicks it to see the comment in a separate comment box or window.
   - **Launch Browser**—If you want WordPerfect to open your saved document in your default browser to see how it looks, choose this option. If your document includes graphic images, choosing this option might be useful to be sure that the images exported and were saved correctly.

- **Plain HTML**—By default, WordPerfect uses Cascading Style sheets to more closely approximate native WordPerfect layouts. In some cases, you want to create generic HTML layouts that can be more easily edited in other programs. Generic HTML also converts more cleanly when opened in WordPerfect. You lose special formatting, but the content remains.
- **Default GIF Options**—If you export any files as GIF images, these options will apply. Interlaced is a method whereby every other scan line of the image is displayed in the browser, followed by the remaining, or interlaced, lines. This option might be helpful for persons with very slow connections, but with today's speedier Web connections, this isn't too important. Transparency means that a solid background color—such as the space in a photo around a person's head—appears transparent, thus allowing background text to show through that space. If you select this option, you also must choose the color that will be transparent. If you use a separate graphics program, you may have already set the image's transparency.
- **Default JPG Options**—You can reduce the size, and also the download time, of JPG graphics by reducing the image's quality. Extremely high quality—for example, 100%—doesn't usually make much difference on a computer screen, which already has limited resolution. However, although extremely low resolution might result in smaller files, the quality of such images will also suffer.

6. Click Publish and WordPerfect converts your document into HTML code using styles.

WordPerfect also converts your graphic images to the format you have selected (JPG or GIF). To change the selected graphic output format, right-click the image, choose HTML Properties, click the Publish tab, and choose the desired format (see Figure W2.29).

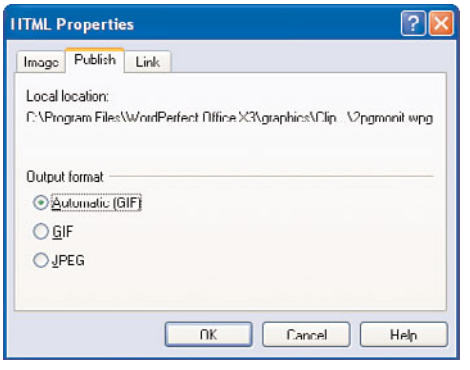


Figure W2.29
When saving a document to HTML, you can specify the format of the document's graphic images in the HTML Properties dialog box.

WordPerfect places converted images in a folder by the same name as the Web page you just created. For example, if the document name is myfile.htm, graphic images are saved in the myfile folder, a subfolder of the one where myfile.htm is located. If the folder doesn't already exist, WordPerfect creates it.

CAUTION

When publishing to HTML a document that contains graphic images, the filename without an extension must not already be in use (for example, as the name of another document in the same folder). If it's already being used, WordPerfect doesn't report a problem, but images are not converted because the folder where they must be stored cannot be created. The result is that you won't see the images when you view your document in a browser.

MOVING FILES TO A WEB SERVER

You're now ready to transfer the published files to your Web server. If you haven't done so already, you should contact your Web server administrator and determine the exact procedures required for moving your Web documents to the server. Two options are most common:

- If you're lucky, you might publish your documents directly to a local or network drive. Many corporate intranets, for example, permit you to save documents directly on network drives that are accessible with a browser. Your Webmaster can tell you where to save your files and whether you need special access rights to such locations.
- If you transfer your files to a remote computer, you often do so using FTP, or File Transfer Protocol. This process involves establishing a connection over the network or by modem to the remote computer and then using FTP software to transfer the files. Your Webmaster can provide you with the necessary login and password information, as well as details as to where to save your files.

NOTE

Because all access to a remote server involves some security risk, Webmasters often establish security procedures that can complicate a simple FTP transfer. Consider this a necessary inconvenience that ensures the future integrity of your server and your documents.

CAUTION

When publishing a document that contains images, be sure that you transfer both the document *and* the images, and that the images are stored in a subfolder with the same name as the Web document. Otherwise, the world will see only the document, without the graphic images.

If your Web page has missing graphic images, see "Where, Oh Where, Is That Graphics File?" in the Troubleshooting section at the end of this chapter.

TIP

If you've already published your Web page before and are merely updating it, and if the page's graphic images haven't changed, you don't need to transfer the images again to the Web server.

MODIFYING OR UPDATING PUBLISHED HTML DOCUMENTS

Instead of revising published HTML documents, WordPerfect's approach is to focus on the original WordPerfect document. Because you're working with the original, you have much greater control over the editing process. You then republish the document to HTML, replacing the earlier HTML version. For most of us, this is the easiest and most easily understood approach.

However, in some cases, you might need to tweak your published HTML document by inserting custom HTML code. For example, you might want to give the document a special background, or wallpaper, which you can't do from within WordPerfect.

To modify the code of an HTML document, open it in a plain-text editor, such as Windows Notepad, or in a specialized HTML editor such as Dreamweaver. Make the necessary changes and save the file.

NOTE

If you make changes to a published HTML document using another program, such changes will be lost if you then use WordPerfect to edit the original WordPerfect document and republish it.

In earlier versions of WordPerfect, you could open HTML documents and edit them in WordPerfect. The design of WordPerfect X3 makes this impractical, because the special formatting styles used in such documents sometimes do not translate well back to WordPerfect. For example, original automatic features, such as outline numbering or table formulas, are lost. Nevertheless, WordPerfect does do a fairly good job of converting primarily text-based documents, preserving most fonts and formatting.

PUBLISHING TO PDF

HTML-based Web pages are still the most common method of publishing and viewing Web documents. However, other options do exist for getting your documents out to the world. WordPerfect includes two of these: publishing to PDF and using Extensible Markup Language (XML). Publishing to PDF is becoming increasingly common and can be performed right from within WordPerfect.

➔ For information on using XML in WordPerfect, see Chapter W3, "Working with XML Documents," **p. Web:75**.

Adobe's PDF, or Portable Document Format, is the process by which you create documents that exactly match the original in terms of layout, fonts, and special effects. Readers can view

these documents with the free Adobe Acrobat Reader, and thus they are not required to have WordPerfect installed on their system.

NOTE

> Adobe Acrobat Reader is a free reader that understands PDF-formatted documents. Many Web sites routinely publish documents in PDF format, and many users already have installed Acrobat Reader. They might see it only as an automatic plug-in to their Web browser, but they can also start the program from the Start, All Programs menu. Also, double-clicking a PDF document in the Windows Explorer automatically starts Acrobat Reader and views the PDF document.

PREPARING DOCUMENTS FOR PDF

Nearly anything you create in a WordPerfect document is faithfully reproduced in a PDF document. If you publish a fairly long document to PDF, consider the following:

- Use heading styles and create bookmarks throughout your document to provide a list of bookmarks for Adobe's Acrobat Reader.
- Create a table of contents using hyperlinks to section headings. These appear as clickable links in the PDF document.
- Create other hyperlinks to aid readers as they navigate the PDF document.

To publish a WordPerfect document to PDF format, follow these steps:

1. Save the document one last time in WordPerfect format. You might need to come back to the original version later.
2. Choose File, Publish to PDF. WordPerfect displays the Publish to PDF dialog box (see Figure W2.30).

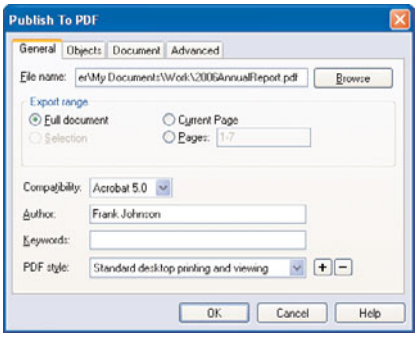


Figure W2.30
Use the Publish to PDF dialog box to create documents that anyone can read using the Adobe Acrobat Reader.

3. Specify the name of the PDF file in the Publish to File edit box. Typically, this is the name of the WordPerfect file, with a .pdf filename extension.
4. Click OK to publish the file to the PDF format.

CHOOSING PDF OPTIONS

The Publish to PDF dialog box offers a wide variety of options, primarily designed to help you fine-tune the PDF document for its intended use. For example, you can choose from three predefined settings, which further change other settings in the PDF dialog box:

- **Standard Desktop Printing and Viewing**—This gives you a high-quality document, but options are chosen that help reduce the size of the file. For example, a 30K WordPerfect file with graphics and links might result in a 35K PDF file.
- **Highest Quality**—This style uses the most options, including embedding all of the fonts in the PDF document. The result can be a much larger file. For example, a 30K WordPerfect file might result in a 180K PDF file. Although such files take much longer to download from a Web site, the recipient of the file has more options in terms of the quality and the interactivity of the file.
- **Smallest File**—This style uses the most aggressive optimizing options to result in a small file, which can be downloaded quickly. Such files also can be viewed in Acrobat Reader version 3, but many quality and navigation options are lost. Using this style, for example, a 30K WordPerfect file might result in a 28K PDF file.

Other options on the General tab of the Publish to PDF dialog box include the capability to publish all or part of a document, to make it compatible with older versions (3 or 4) of Acrobat Reader, and to add author and keyword information.

Unless you change the filename, WordPerfect saves the file with the same name as the original but with the .pdf filename extension. WordPerfect publishes PDF documents so quickly that it's easy to think nothing has happened. You can verify the PDF format by starting Adobe Acrobat Reader and opening the PDF file you just created (see Figure W2.31).

CAUTION

Although WordPerfect's implementation of the Adobe Acrobat standards is very good at converting your WordPerfect documents to PDF format, not everything converts perfectly. For example, some spacing between characters isn't perfect. Before you distribute the PDF version of your documents, you should check it both onscreen and by printing a page or two to make sure you can live with these minor problems.

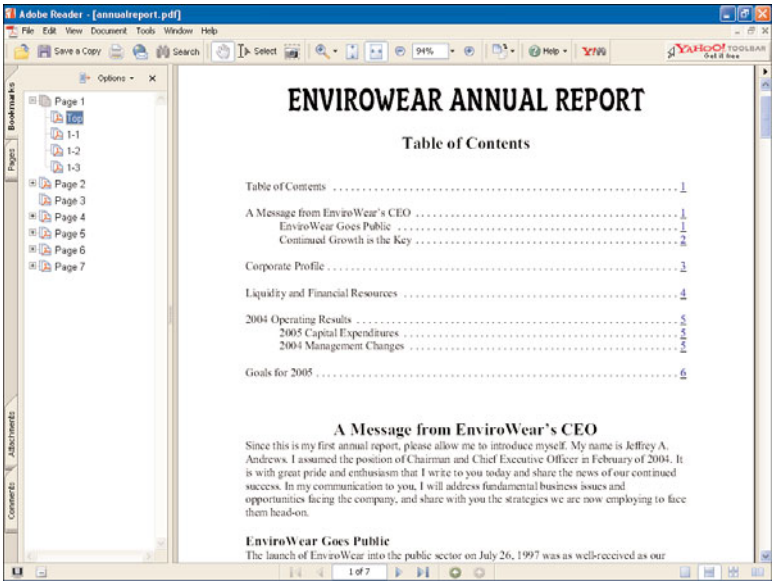


Figure W2.31
The Adobe Acrobat Reader enables anyone, even non-WordPerfect users, to see your documents exactly as you intend them to appear. Readers can easily zoom in or out, print, or even use hyperlinks or bookmarks if you include them.

Although you can stay with the three default PDF styles, you can also choose various options to make your PDF document better meet your needs. Among the options found on the other three tabs of the Publish to PDF dialog box are

- **Text and Fonts**—You can embed fonts in the document if you want to be sure that all computers can view them properly. You can also have Adobe convert fonts to other types, such as Adobe's Type 1 fonts, and you can even specify that font characters are exported only for those characters actually used. Finally, you can specify that fonts should be treated as graphics (or *curves* as Adobe calls it), if the other options aren't satisfactory.
- **Compression**—You can specify whether to compress text and line art, and choose the type of bitmap compression from among LZW, ZIP, JPG, or none. The default is JPG compression, and with it, you can further specify the resulting image quality.
- **Document Options**—You can specify whether to display hyperlinks, and how Acrobat Reader should start up when displaying the page: the page only, the page with a handy index of bookmarks, or a full screen with no Acrobat Reader menus. The default is Page Only.
- **Advanced Options**—You can specify whether the document should be optimized for the Web, whether to include embedded files, and what type of color output should be used: RGB, CMYK, Grayscale, or Native. The default is RGB, a basic color scheme.

You probably won't need to worry about these options because the standard PDF style combinations generally provide satisfactory results.

USING PDF DOCUMENTS ON THE WEB

Although PDF documents are useful in nearly any context, they are frequently used in place of Web pages where formatting is of particular concern, such as with a company brochure or a newsletter.

You link to PDF documents just as you do with other HTML documents. Select the text or image you want viewers to click on, and create a hyperlink to the PDF document. Just be sure that the PDF document transfers to the Web server along with your HTML pages.

When users click a link to a PDF document, if Acrobat Reader is already installed on their computer, their Web browser automatically starts Adobe Acrobat Reader and displays the document within the browser.

Users can also right-click the PDF link and download the PDF document to their own computer. They can then use Acrobat Reader to open and view the document.

TIP

> If you want to make sure all users can read PDF documents on your Web site, consider placing a note along with a link to the Adobe Web site where users can download and install the free Adobe Acrobat Reader.

An added bonus for WordPerfect users is that WordPerfect X3 enables you to open a PDF file directly into WordPerfect for editing. PDF documents published from WordPerfect tend to work best, but other documents open as well.

➔ For information on opening PDF documents in WordPerfect, **see** "Opening and Converting PDF Documents," **p. 349**.

TROUBLESHOOTING

RIGHT-SIZING GRAPHICS

I'm using a graphic I created in Corel Presentations, but although it looks fine on my screen in WordPerfect, it looks lousy in my Web browser.

Bitmap graphics, such as GIF and JPG, cannot be enlarged without creating display problems. When you save a Corel Presentations image as a GIF or JPG file, specify the exact size you need on your Web page so that you don't have to change the size of the graphic in WordPerfect.

Consider publishing documents to PDF if perfect graphic images and image placement are absolutely critical to your Web page.

SAVING AS HTML

When I view my Web page in a browser, I see lots of strange characters on the screen—they begin with WPC—but I don't understand anything after that.

If you save your Web page with the .htm or .html filename extension but forget to publish it to the HTML format, that's what it will look like when viewed in a browser. Just open the file with WordPerfect and this time publish it to HTML.

WHERE, OH WHERE, IS THAT GRAPHICS FILE?

Everything looks good when I'm previewing my Web page, but after I publish it, some of the graphics are missing.

Several issues can affect your published Web page. First, you must be sure that all elements of the page, including graphics, are published to the target location. If you manually copy or FTP files, you might miss a file. Second, when you publish the page, the Web page references graphic images in a separate subfolder. If you place the images on the server in the same folder as the Web page, the browser won't be able to find them. Finally, be sure the case of the filenames and locations is correct. Most UNIX-based Web servers distinguish between upper- and lowercase, whereas Windows does not. If your Web page says to use Image.gif, and the name of the file on the server is image.gif, the server won't know what file to use.

ALL BROWSERS ARE NOT CREATED EQUAL

My Web page looks good when I view it in my browser, but my friend says parts of it are messed up when she looks at it on the Web.

Not all browsers view the same HTML code in the same way. For example, even different versions of Firefox, Netscape, Internet Explorer, or Safari can view a page differently. If users are viewing your page on a Macintosh, or if they're using Internet Explorer and you're using Firefox, they might get different results. As a Web page creator, you should take the time to view your page in different browsers and on different platforms, and then make adjustments to your page if possible so it looks good on all of them. If what you want to accomplish on your page just won't work in other browsers, you should note that on your page by including a link to the viewer download site that says something such as, "This page is best viewed using SuprBrowz 5.7. Click here to download the free viewer."

Finally, consider using Publish to PDF if an exact replica of your WordPerfect file is required.

CHAPTER W3

Working with XML Documents

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UNDERSTANDING XML

XML—it seems to be all the rage these days. Nearly any up-to-date software product touts its XML capabilities as if you already knew what it is and why it's important to you. We can't promise that you'll understand XML completely by the time you finish this chapter, but we do hope you'll have a better idea as to what XML is and how you can use it in practical ways.

In a nutshell, *XML* is *Extensible Markup Language*, a method for defining document information and making it easy to transmit or reuse that information, without regard to proprietary software or operating systems.

WHAT'S IN XML FOR YOU

Before jumping into definitions for XML, you probably want to know whether it's necessary or even worth the effort to learn about XML.

Honestly? For most individual work, using XML is of little intrinsic value or interest. If you work on your own, and creating good-looking documents for printing is your primary use for WordPerfect, you do not need to read much further, unless, of course, you'd like to know what the fuss is all about. If you're in an environment where sharing and reusing document information is important, you probably do need to know about XML. In any case, it's quite possible that someday XML will also be useful for the rest of us, so a quick tour of this chapter might be worth your time.

One of the great challenges in our information society is the proliferation, and repetition, of information. How many times have you created a document, only to find that someone needs the same information but they use a different word processor? Sometimes, you have no common format other than the Web or a PDF version, both of which enable you to see the information but offer virtually no capability to reuse that information directly.

Consider another example. You write the Great American Novel, and, of course, you publish it first in hard-bound form. It sells well, and the publisher now wants to make it available in paperback or even electronic formats. In the past, the publisher would have to spend a great deal of time reworking the document to adapt it to the new formats: with smaller type and different page layout for a paperback version, or with links and navigation tools for an electronic book or PDA version.

XML comes to the rescue by making it possible to reuse information without having to replicate or re-create it. In XML, when you create your documents, you define the elements of the document in structured ways: book, chapters, sections, paragraphs, and so on. You then apply a definition document that interprets what those elements mean and how they should be used, and only then do you worry about how those elements are to be displayed.

Again, however, this probably isn't enough to drive you to use XML. More likely, you've come to this chapter because your company is requiring you to create XML-compliant documents. In a multiuser environment, the reuse of information in a variety of contexts is probably the best argument for understanding and using XML.

Although XML can be quite complicated, how much you need to know about XML can vary widely from those who design the Document Type Definition files (a lot), to those who create the basic document information (not too much).

NOTE

> Working with XML involves new concepts and approaches to publishing a document. Before you try to learn how to use XML in WordPerfect, you should be thoroughly familiar with all WordPerfect basics. You should also be familiar with current Windows operating systems, including how to use Windows-based applications, how to browse for files, and so on.

DEFINING XML

XML stands for Extensible Markup Language, and it's a simpler, easier-to-use subset of SGML, or Standard Generalized Markup Language.

More likely you've heard of HTML, or Hypertext Markup Language. So how are these different? Consider the following snippet of code in HTML:

```
<html>
<body>
<h1>Working with XML</h1>
How are <i>HTML</i> and <i>XML</i> different?<p>
</body>
</html>
```

HTML uses *tags* to mark up the text, which then is translated by your Web browser to show such elements as heading styles (`<h1>`) and attributes such as italics (`<i>`). Anyone used to seeing WordPerfect's Reveal Codes recognizes the use of paired tags to turn on or off attributes or formatting features. HTML codes are standardized so that any Web browser can read and interpret them. Their primary purpose is to help browsers *format* content. If you need to go beyond standard HTML definitions, you might be out of luck.

Now, consider the following snippet of XML code:

```
<fruitbasket>
<apples>Granny Smith</apples>
<pears>Bartlett</pears>
<grapes>Concord</grapes>
</fruitbasket>
```

None of these codes are anything you ever learned in an HTML class. Nevertheless, you notice that this code is *well formed*. That is, each beginning tag has an ending tag, and each set of tags is properly nested within a hierarchical structure.

The problem, however, is that unless someone tells us what these tags mean, they aren't that useful. Fortunately, XML enables you to use or create definitions for its elements in separate files called *Document Type Definitions*, or *DTDs*. When an XML document is paired with a DTD, and its elements match those of the DTD, it is said be valid. Proper XML must be both *well formed* (without syntactic errors) and *valid* (elements in the right places as determined by the DTD).

NOTE

> Several government and professional organizations have created their own standardized DTDs that facilitate the exchange of information in their particular arena. These include the DocBook DTDs designed for narrative and technical books or the NITF for the newspaper industry.

WORDPERFECT'S APPROACH TO XML

WordPerfect tries to make creating XML documents easier by offering the same familiar WordPerfect interface, along with a structured, yet simplified, XML editing environment.

In the XML domain, you typically must create a DTD and then create an XML document using the elements defined in the DTD. You also have to validate your XML document and then apply formatting layouts to it depending on how you want to use the document's information.

WordPerfect incorporates the same elements but a bit differently. Starting with a DTD, you compile the DTD, which becomes part of a WordPerfect template. You then create your document using a template. You can then use or create new layouts and quickly switch from one layout to another, while using the same XML document.

CREATING AN XML DOCUMENT

We're going to put the cart before the horse for a while. As noted previously, you need a DTD and a template before you can actually create an XML document. However, most of you won't ever need or want to worry about creating DTDs or templates. So we'll start with the assumption that someone else already has created these for you, and you're now ready to create a document.

CHOOSING AN XML TEMPLATE

Fortunately, WordPerfect comes with a few sample templates. For example, to create a newsletter article from the XML template for news, follow these steps:

1. Choose File, New XML Document. WordPerfect displays the Select or Create an XML Project dialog box (see Figure W3.1, which shows a project already selected).

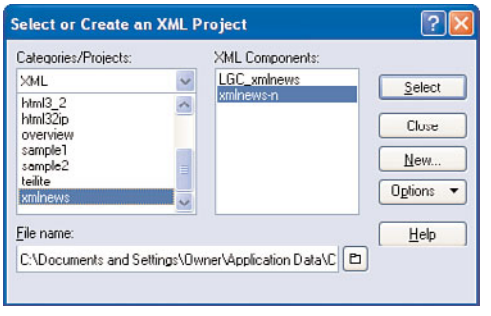

Figure W3.1
You create an XML document by selecting an XML project based on XML templates.

2. Select a category/project from the left column—for example, xmlnews.
3. In the XML Components column at the right, select the layout you want to work with. In this case, there are only two, so select xmlnews-n.
4. Click Select and WordPerfect displays a blank XML editing screen (see Figure W3.2).

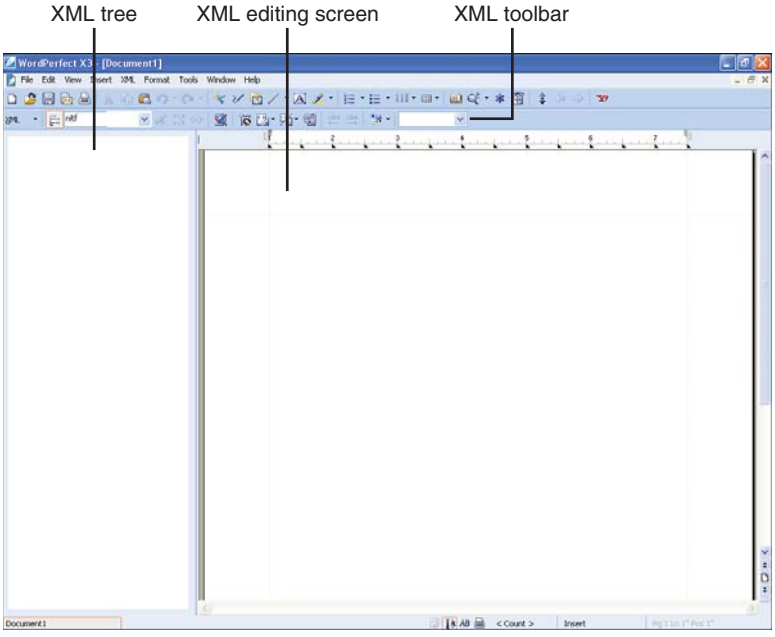

Figure W3.2
Although you edit XML documents using familiar WordPerfect procedures, the screen layout, menus, and toolbars change to assist you in the XML task at hand.

CREATING XML DOCUMENT CONTENT

At this point, you could certainly begin typing as you normally do in WordPerfect, but you would create only invalid XML content. Instead, you need to insert valid XML elements and then add content within those valid elements. For example, follow these steps for adding newsletter content:

1. Choose Insert, Elements, or click the XML button on the toolbar and choose Elements. WordPerfect displays the Elements dialog box (see Figure W3.3), which provides only those elements that are valid at this point in the creation of the document.

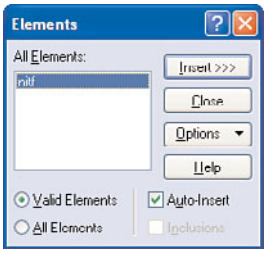

Figure W3.3
The Elements dialog box helps you select only valid XML elements.

2. The only valid element is nitf (News Industry Text Format), so select it and click Insert. WordPerfect inserts a pair of nitf codes, offers to let you modify the nitf attributes, and also begins the XML tree structure in the left pane.
3. Unless you know that you want to change an attribute, you do not need to select anything. However, try selecting a version from the Attribute Name list. Click Edit Value to select it. The information appears in the actual XML code, but you do not see it in your document.
4. Click Close and WordPerfect automatically inserts the next sequence of required elements. If you want, you can type a title for the document, such as **Newsletter**. Although this isn't part of the displayed document information, it can be used as part of the structural identification of the document.
5. Click Close to close the Elements dialog box.
6. Position the cursor between the body tags.
7. If the Elements dialog box isn't already open, choose Insert, Elements. The Elements dialog box displays only those elements that are valid at this point of the document. This news article DTD allows for `body.head`, `body.content`, and `body.end`. Choose `body.head` and click Insert.

CAUTION

> You can select valid elements from the Valid Elements drop-down list on the property bar. However, for some reason, the cursor tends to jump around after you select elements from this drop-down list. I recommend that you use a longer but safer method of choosing Insert, Elements and selecting elements from the Elements dialog box.

8. With the cursor between the `body.head` tags, you now see various valid elements, such as hedline (headline), byline, and so on. Choose hedline and click Insert to insert the headline tags.
9. Between the hl1 (headline 1) tags, type the title of your newsletter article—for example, **`EnviroNews`**. Note that the font and font size are considerably larger than the regular text (see Figure W3.4). This is because a layout rule has been applied to the hl1 element as part of the XML template. You'll learn about layouts later in this chapter.

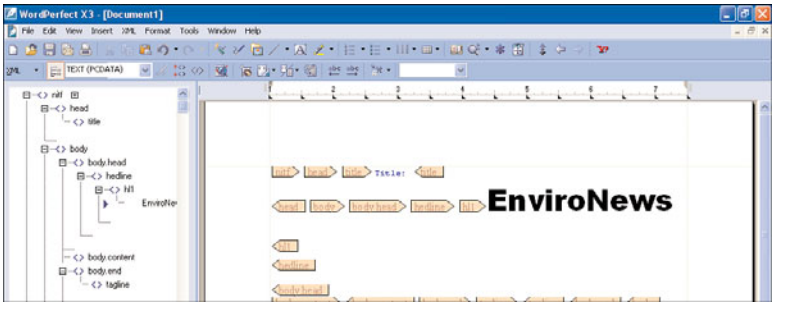

Figure W3.4
Layout rules can be associated with specific XML elements.

10. Position the cursor before the closing `body.head` tag. Note that the hedline element is no longer valid because you have already used it. You might want to try adding the byline tag and also add your name.
11. Position the cursor before the closing body tag and insert the `body.content` tag.
12. Position the cursor before the closing body tag and insert the `body.end` tag.
13. Choose File, Save, and supply a filename. WordPerfect automatically saves the document in XML UTF-8 format, but if not, choose File, Save As, and choose the XML (UTF-8) format before saving.
14. Finally, if you haven't done so already, WordPerfect asks if you want to check for errors before saving. Click OK. Then, click No to tell WordPerfect you don't need to check again. You can also close the Elements dialog box.

CAUTION

> The WordPerfect XML Editor is notorious for crashing at unpredictable moments. Even more so than usual, it's a good idea to save *early* and save *often*.

You can further experiment by inserting valid `body.content` and `body.end` elements with your own text.

WORKING WITH THE XML EDITOR

You've already discovered that the XML Editor in WordPerfect is somewhat different from the standard WordPerfect interface. Let's take some time to explore the various components of the XML Editor screen (refer to Figure W3.4).

The XML tree, at the left of the screen, shows the structure of the document and whether XML elements are valid. Although this screen can be helpful when you validate your document, it doesn't offer help much while you're creating your document. If you want more editing space, you can turn off the tree by choosing XML and deselecting Show XML Tree.

Another difference is that the Menu changes, adding XML options and removing Table options. In addition, the options under Insert and Format change dramatically to reflect XML-related tasks. Other XML Editor menu options are nearly the same as those found on standard WordPerfect menus.

Finally, the XML Editor displays the XML toolbar, which provides quick and easy access to the more important XML editing activities (see Figure W3.5).

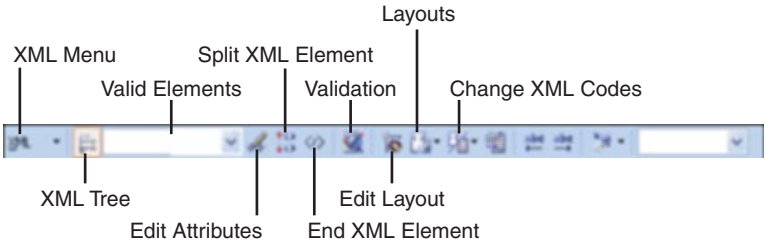

Figure W3.5
The XML toolbar helps you quickly create valid XML documents.

The buttons on the XML toolbar specific to editing XML documents include

- **XML Menu**—Most of the elements found under the XML menu, or represented by XML toolbar buttons, can also be found under the XML drop-down menu. Clicking the XML button can be a handy way to remember what options are available, although using a toolbar button directly might be quicker and easier when you're familiar with its use.
- **XML Tree**—Click this button to turn the XML tree view on or off.
- **Valid Elements**—This drop-down list displays elements you can use at the current position of your cursor. You can also insert valid elements from this list by clicking the element from the drop-down list.
- **Edit Attributes**—This option is reserved for those elements that require further definition, such as the root (first) element of the document. It does not apply to most elements and has nothing to do with formatting attributes.
- **Split XML Element**—Clicking this button splits the current element, in effect replicating the element. This can be particularly useful when creating a series of paragraphs. For example, with the cursor in a current paragraph, you click the button and a new pair of paragraph tags appears, without having to position the cursor outside the paragraph tags and then insert a new set of paragraph tags.
- **End XML Element**—Clicking this button usually moves the cursor past the closing tag. Because the WordPerfect XML Editor automatically creates pairs for most elements, this option isn't required to create closing element tags.
- **Validation**—At any time, but certainly before saving or publishing an XML document, you can check the validity of the elements you've used.
- **Edit Layout**—Clicking this button opens the WordPerfect XML Project Designer where you can create or modify layouts for the current XML document.
- **Layouts**—If you have more than one layout assigned to the current XML document, clicking this button enables you to choose from among them.
- **Change XML Codes**—This button's name is somewhat misleading because it doesn't actually change XML Codes. It does change how tags are displayed in your XML document. By default, XML tags display fully (refer to Figure W3.4). However, you can also choose to display no tags at all or to display markers (see Figure W3.6). As you begin

working with XML documents, you'll probably want to display the full XML tags. As you gain more experience, or if you want to view how the document will look, choose one of the other options.

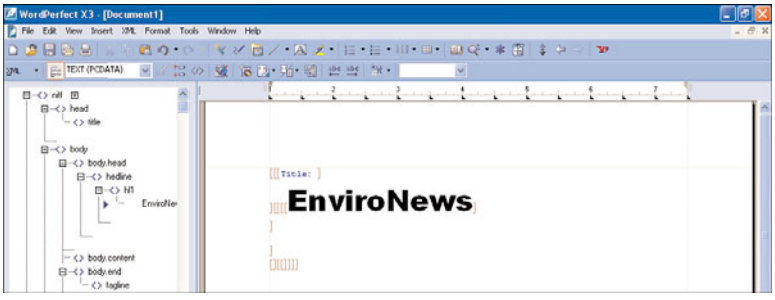

Figure W3.6
You can use markers to indicate XML elements instead of using descriptive tags or not using anything at all.

VALIDATING AN XML DOCUMENT

The two requirements for an XML document are that it must be well formed and that its elements must be valid. As you create the document, WordPerfect makes it difficult to use elements incorrectly. However, as you edit a document, you might inadvertently add or delete elements in such a way that they are no longer well formed or valid.

At any time, but certainly before saving an XML document, you should validate your document. Otherwise, you defeat the purpose of an XML document because others won't be able to use or reuse your document because they won't understand its structure and elements.

WordPerfect makes it easy to quickly determine what does and doesn't meet these criteria, using either of two methods:

- The first is to use the XML Tree view. If you turned this view off, turn it back on by choosing XML, Show XML Tree, or click the XML Tree button on the toolbar. In the XML Tree, problems are noted by an inverted yellow triangle. If you hover the mouse pointer over the triangle, WordPerfect displays a brief description of the problem.
- The second method is to validate the entire document by choosing XML, Validation, or by clicking the Validation button on the toolbar. WordPerfect displays the Validation dialog box (see Figure W3.7). By default WordPerfect tries to find all possible errors, starting at the beginning of the document. Click Start and WordPerfect quickly moves through all of the document's elements, pausing only to report problems it finds (see Figure W3.8).

Unfortunately, until you become more experienced creating valid XML code, some of the descriptions offered during validation might be difficult to interpret. For example, if the message tells you that an element is not allowed at this point, it could mean that the element should be nested within another element and that you've either moved the nested element or accidentally deleted the element that should surround it.

Figure W3.7
Although you have many validation options, generally you stick to the defaults when validating an XML document.

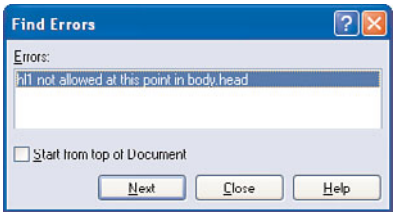

Figure W3.8
Error messages can help you determine and fix XML coding problems.

W3

For example, in Figure W3.8, you are told that element hl1 is not allowed at this point in `body.head`. If you position the cursor before or after the hl1 tags, you notice in the valid elements list that you could have a hedline or byline at this point. You then realize that somehow the hedline codes are missing.

If you simply insert the hedline tags, the hl1 tags and accompanying text are still not where they should be, nested within the hedline tags, and thus the code is still invalid. If you select the hl1 tags and text and move them to within the hedline tags, you've fixed the problem. Better yet, before inserting the hedline tags, select the hl1 tags and text, and *then* insert the hedline tags that correctly wrap around the selected elements.

FORMATTING AN XML DOCUMENT

The most important thing to remember about an XML document is that *data is data*! That is, the content of your document is of primary concern. If the structure and elements are well formed and valid, you or anyone can use that data and display or present it in a variety of formats, or layouts.

UNDERSTANDING XML LAYOUTS

In a typical XML process, the document itself and the DTD don't concern themselves at all with how the document is to be formatted. All they care about is making the document content usable.

For example, you can create an element such as `<model></model>` and valid content might include the various automobile models in your inventory. Such an element is concerned only

with the content, and thus it is very different from typical HTML codes (or even WordPerfect formatting codes) that define *how* something is to be displayed, such as bold, italic, large font, and so on.

Formatting of XML data can be accomplished in a variety of ways, using whatever tools are available. For example, you can create Cascading Style Sheets (CSS) or use other separate programs to describe how various XML entities should be displayed.

Fortunately, WordPerfect includes its own XML Project Designer that enables you to define how various elements display. These definitions are collected in *layouts* and are stored in the same XML template that contains the DTD.

CREATING AN XML LAYOUT

Some templates that ship with WordPerfect contain basic layout information. For example, the news article template displays normal text in a certain font (Garamond), while displaying the headline in a different, larger font (Arial Black, 32 pt).

At some point, however, you or someone else must determine exactly how you want to display the content of an XML document. You do this by using WordPerfect's XML Project Designer, where you can create entirely new layouts, or modify existing ones. Further, you can create up to 10 different layouts and store them in the same XML template.

Suppose, for example, you have created the content for your XML newsletter (refer to Figure W3.4). Click the Edit Layout button on the toolbar. WordPerfect displays the XML Project Designer (see Figure W3.9).

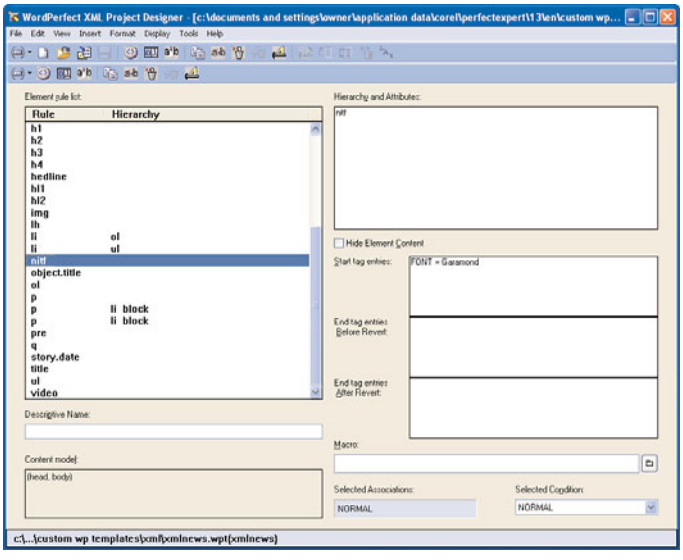

Figure W3.9
The WordPerfect XML Project Designer is a separate program that helps you modify rules for displaying XML elements.

NOTE

> Although the XML Project Designer appears to be just another dialog box, it's actually a separate program. The XML Editor's Edit Layout button makes it easier to access the program and to automatically edit the current layout.
>
> Alternatively, you can open the XML Project Designer by going to the Windows Start menu and choosing All Programs, WordPerfect Office X3, Utilities, WordPerfect XML Project Designer. Then within the program, you choose File, Open and select the XML Project (template) and Component (layout) you want to edit.

You can edit the default xmlnews layout, but you're better off creating a new layout so that you don't lose the original. To create a new layout, based on the original layout, follow these steps:

1. Choose File, New, Layout. WordPerfect clears the XML Project Designer lists.
2. Choose File, Retrieve. WordPerfect displays the Retrieve Layout dialog box (see Figure W3.10).

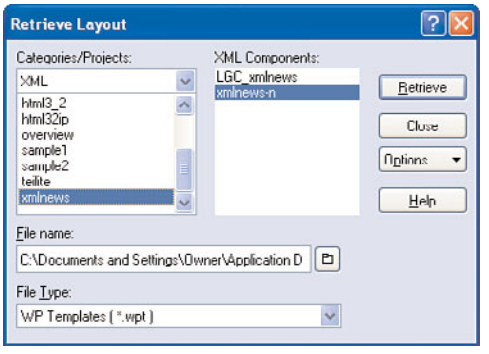

Figure W3.10
You retrieve an XML layout (component) from an existing XML template (project).

3. Choose the layout you want to insert by choosing a project (template)—for example, choose the XML category, then xmlnews project from the Categories/Projects list, and then choose the layout from the Component list—for example, xmlnews-n.
4. Click retrieve and WordPerfect inserts the selected collection of elements into your new, about to be created, layout.
5. Before you proceed, Choose File, Save to save your new layout. WordPerfect displays the Select Layout dialog box (see Figure W3.11). You can overwrite an existing layout (be careful!) or supply a new name in the Layout Name text box. Click Save.

NOTE

> When you save a layout, you save it in an XML template. Thus, it becomes available not only to the current XML document, but also for all existing and new XML documents based on or created using that XML template.

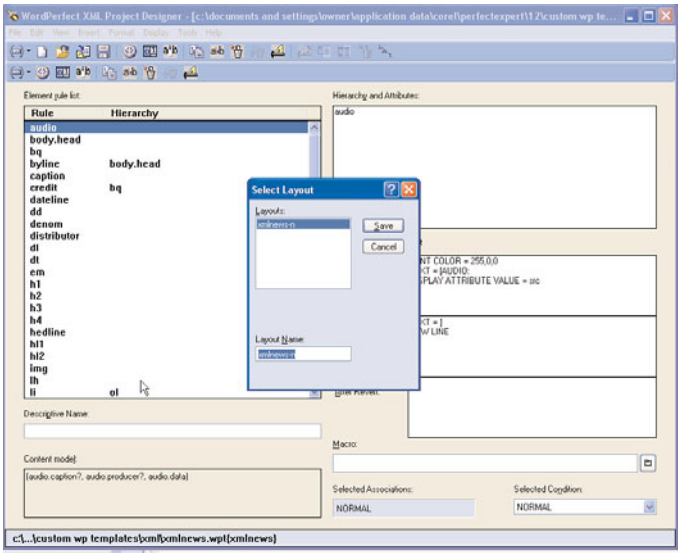

Figure W3.11
Use a unique name to identify the type of layout you're creating for your XML template.

You now can begin to modify the rules for any of the document's elements, which include overall attributes, and what attributes or text to insert before or after the element appears. These rules are what determine how the document's content displays. For example, suppose you don't like the default Garamond font used in the original layout. To change an element, follow these steps:

1. Select the element you want to change in the Element rule list. For example, the default font is set in the nitf element, which is the root, or first element in the document.
2. Choose Edit, Edit Rule, or simply double-click the rule in the Element rule list, directly under the Rule column, not the Hierarchy column. WordPerfect displays the Element Rule dialog box (see Figure W3.12).

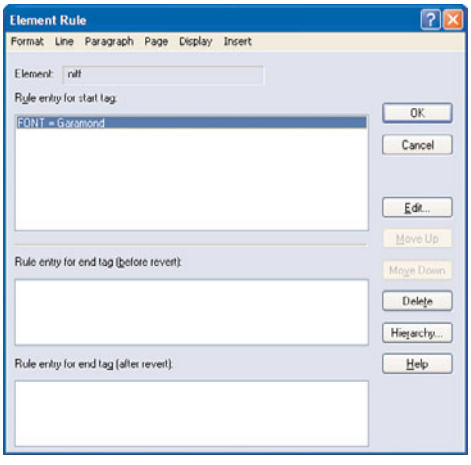

Figure W3.12
Elements define content. You create your own rules for displaying that content.

W3

3. Note that the Start Tag rule specifies the Garamond font. Select that rule and click Delete to remove it. If you only want to change it, you could double-click the rule entry to go directly to the Font dialog box.
4. Click Format, Font, and from the Font dialog box, choose the font, size, and other attributes you want to serve as your default document font. Click OK.
5. Click OK again to return to the XML Project Designer.

You can now select other items you want to change. To see some of the possibilities, try changing two of the headline elements by following these steps:

1. Click the hedline element. Notice that it doesn't include font information, although it does indicate that two lines will separate the headline from the next element in the document.
2. Click the hl1 element. This is the element that actually contains the headline content. Double-click it to open the Element Rule dialog box.
3. Double-click the Font rule, and change it from Arial Black to something more interesting. Click OK.
4. Choose Paragraph, Justification, Center to center the title, and then click OK.
5. In the Element rule list, double-click the byline element. WordPerfect displays the Element Rule dialog box.
6. Choose Display, Text. Because the content of the byline element contains only a person's name (for example, yours), you need to add text that precedes that content. In the Text dialog box, type **By** followed by a space, and click OK. WordPerfect inserts the new rule following the Font rule (see Figure W3.13).

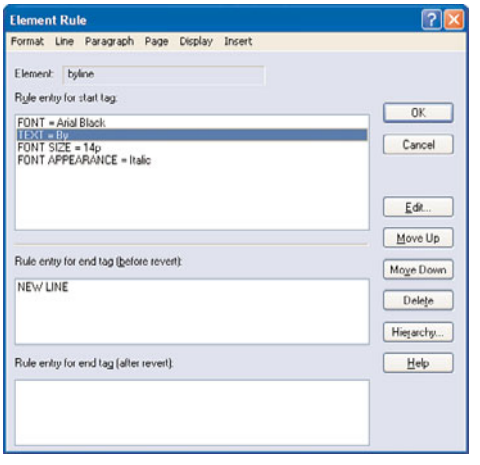

Figure W3.13
Not only can you add rules, but you can also change the order in which they're applied to an element.

7. Unfortunately, in its current position, "By" will be in the right font but won't be the right size or in italics. Change the order of the text rule by clicking Move Down until it follows the other rules, and then click OK.

You have a great deal of flexibility in defining the rules by which XML elements are to be displayed. You can even choose not to display elements by checking the Hide Element Content box. For example, select the Title element, and check the Hide Element Content box so that the title element doesn't display in the document.

When you finish editing the layout, choose File, Save. If you haven't named your new layout, WordPerfect displays the Select Layout dialog box (refer to Figure W3.11). You can overwrite an existing layout or supply a new name in the Layout Name text box. Click Save. Having saved the layout in its associated WordPerfect XML template, you then close the Project Designer to return to WordPerfect's XML Editor.

You now can apply your new layout, or any other defined layout, by clicking the Layouts button on the toolbar and selecting the layout you want. If you select None, you see what your document content looks like without any formatting.

In the future, if you create a new XML document based on this modified XML template, you can still use the same saved layouts. This is a great tool for standardizing the look of your documents, which can be a real timesaver in a corporate environment. Most individuals, however, will find this process to be more work than is necessary for their personal documents.

PUBLISHING AN XML DOCUMENT

Sharing your XML documents with other people can be as simple as providing them with your basic XML data, or providing them also with DTD and layout information. You can also print the document.

NOTE

> WordPerfect offers a Publish to XML option (found under File, Publish To, XML) that is different from the process described in this section.

SAVING AN XML DOCUMENT

By default, when you save a new XML document, WordPerfect assumes you want to save it in XML format. Choose File, Save (or Save As), and WordPerfect displays the Save File dialog box. Note that the file type is XML UTF-8. Supply a filename and click Save. WordPerfect saves the file with an .XML filename extension.

PRINTING AN XML DOCUMENT

You print an XML document just as you do any WordPerfect document. However, consider the following:

- Apply a layout that works well for a printed document. For example, no layout, or one designed for a Web page, might not look good on the printed page.

- What you see in the XML editing screen is what you print. Unless you want them there, first turn off the Display codes or markers. Click the Change XML Codes button on the toolbar, and select Hide Codes (see Figure W3.14). You can turn them back on again if you want them for further editing.

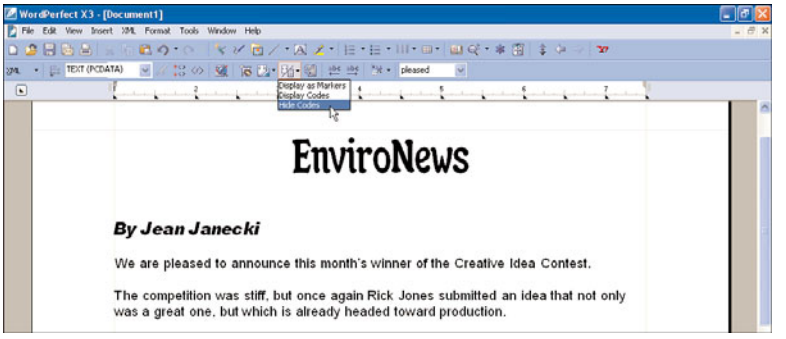

Figure W3.14
If you hide the XML codes, you get a better idea as to how your layout rules affect your XML document.

W3

DISTRIBUTING AN XML DOCUMENT

If you decide to share your XML document with someone else electronically, you also need to provide the XML template from which the document derived. Because the template contains the DTD and layout information, the XML document is nothing more than a collection of data and undefined (invalid) tags without the template.

In a corporate environment, typically, such templates are accessible by everyone in a central network drive and folder. When you open an XML document from someone else, your networked version of WordPerfect automatically checks in the shared template folder and matches the DTD and layout information for that document.

If you don't all share the same template folder, you need to provide *both* the XML document and its template. The recipient then must save the template in his or her default template folder (for example, C:\Documents and Settings\Owner\Application Data\Corel\PerfectExpert\13\EN\Custom WP Templates\XML). Then, when the recipient opens the XML document in WordPerfect, WordPerfect finds the associated template and knows just what to do with the XML document.

UNDERSTANDING ADVANCED XML TASKS

As noted earlier, if you're an individual working alone, using XML is going to be of little importance to you. On the other hand, if you're working in a shared environment where standards are important, XML can be of great value.

Nevertheless, most individuals don't want or need to know about the inner workings of XML. Creating DTD files, compiling DTDs, or creating XML templates and corporate XML layouts likely will be the responsibility of your company's Information Technology

personnel. Such individuals are better equipped to deal with the somewhat arcane intricacies of the XML process.

Nevertheless, the following can give you a sense of what these advanced tasks are all about, in case you want to know, or if you need to discuss these matters with an expert.

Help for Advanced Uses of XML

WordPerfect provides a couple of fairly useful aids to learning about its approach to creating XML documents. One is a tutorial that can be found in the WordPerfect XML Project Designer. In Windows, go to All Programs, WordPerfect Office X3, Utilities, XML Project Designer, and then within that program, choose Help, XML Tutorial. The tutorial doesn't begin with document creation, but rather with creating and compiling DTDs. Thus, it might be useful to survey this entire chapter first to get an overall sense of the process before tackling the tutorial.

The other aid is a comprehensive, 138-page XML Manual that WordPerfect published in PDF format and shipped with WordPerfect Office 2000 and WordPerfect 9. WordPerfect revamped its XML procedures with WordPerfect 9, but little has changed since then except minor modifications and bug fixes, and thus the manual is still applicable to XML and WordPerfect X3. If you can find a copy of WordPerfect Office 2000, you'll find the xml9en.pdf file on the distribution CD. You might also find the file by searching for it on the Internet.

In addition, you can find other helpful resources on the Web. For example, I searched for WordPerfect XML and found an article that talked about using XML for working in an academic law instruction environment (http://www.cali.org/conference/2001/postconf/2001C23d1/).

Many articles and books are written about XML, but you also need to find those that show how it is used in WordPerfect.

UNDERSTANDING DTD FILES

A Document Type Definition (DTD) file provides definitions for tags you use in an XML document. XML is much more flexible than HTML because you can use literally any tag to define XML content, if you define it so others know what to do with it.

DTD files are nothing more than ASCII files. If you open the xmlnews.dtd file in Notepad, you find definitions for every element in the News Industry Text Format (nitf) document type. The following snippets are from that DTD:

```
<!— Document header —>
<!ELEMENT head (title, base?)>
```

Note that the "head" tag refers to the document heading—a nonprinting part of the document—and includes the required title and optional base tags (indicated by the question mark).

```
<!— Story headline group —>
<!ELEMENT hedline (hl1, hl2*)>
```

In the hedline element of the document, authors can define one main headline (hl1) and one or more (*) subheadlines (hl2).

```
<!— Story headline —>
<!ELEMENT hl1 (#PCDATA | chron | copyrite | event | function | location | money
 | num | object.title | org | person | virtloc | a | br | em | lang |
pronounce | q)*>
```

Finally the headline itself (hl1) can include optionally (indicated by |) one or more (indicated by *) elements, and include text (#PCDATA) and other identifiable pieces of information (such as org, person, pronounce).

The language required to create a valid DTD is not terribly difficult. However, because they try to establish standards for certain types of documents, and because such standards usually come from committees, the actual creation of new DTDs usually is left up to the experts.

Several industry standard DTDs have emerged, including those from the government, the technical publishing industry, and the news industry. One of the most common DTDs is the docbook standard, which is currently in revision 4.2. This is the standard DTD by which WordPerfect documents are published to XML, unless otherwise designated. Industry standard DTDs also tend to develop slowly over time, with lots of feedback from users and discussion by committee members before new DTD versions are released. Therefore, some DTDs are more than a couple of years old, but on the other hand, that does provide for a certain degree of stability in an otherwise rapidly changing computing world.

COMPILING DTD FILES

To use a DTD to create a new WordPerfect XML document, you must first compile the DTD and make it part of a WordPerfect template. You do so using WordPerfect's XML Project Designer, and the result is incorporated in a WordPerfect XML template.

The DTD itself must be properly created. WordPerfect provides virtually no help in troubleshooting compiling problems, other than to indicate there are problems. If the compiler encounters errors, it will not create a template. Thus, you have to resolve all errors before you can create a new template based on a DTD.

In addition, if any additional information is needed, such as reference to external files that describe how to deal with graphic images, these must be properly noted in a catalog file.

NOTE

> The requirements for creating a valid DTD are quite stringent. The possible combinations and problems that can arise are far beyond the scope of this book. This section is included if you are provided with a DTD and need to compile it before using it.

To compile a DTD file and generate an XML template, follow these steps:

1. Open the WordPerfect XML Project Designer by going to the Windows Start menu and choosing All Programs, WordPerfect Office X3, Utilities, WordPerfect XML Project Designer. WordPerfect opens the XML Project Designer.
2. Choose File, DTD Compile. WordPerfect displays the WordPerfect DTD Compiler dialog box (see Figure W3.15).

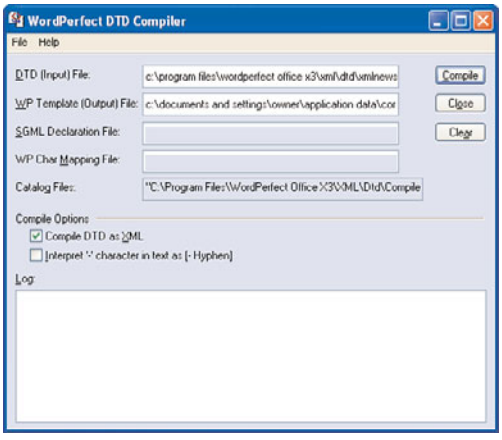

Figure W3.15
When you compile a valid DTD file, it then becomes part of an XML template.

3. Specify the full path and filename for the DTD (input) file. In WordPerfect Office X3, this is typically C:\Program Files\WordPerfect Office X3\XML\DTD*filename.dtd*.
4. Specify the full path and filename for the new template (output) file. Typically, this should be in the same location as your other XML template documents. In WordPerfect Office X3, this is typically C:\documents and settings\owner\application data\corel\perfectexpert\X3\en\custom wp templates\xml*filename.wpt*.
5. Make sure the Compile DTD As XML box is checked.
6. Click Compile. WordPerfect then compiles the DTD and generates a WordPerfect XML template. If there are any errors, WordPerfect does not generate a template but instead displays error messages in the Log area of the DTD Compiler dialog box.
7. If the compilation is successful, click Close and then exit the XML Project Designer.

Now, when you choose File, New XML Document, your recently compiled template appears as one of the available projects.

PUBLISHING WORDPERFECT DOCUMENTS TO XML

In WordPerfect X3, you find the following option on the File menu: Publish to XML. The option sounds intriguing, but it's not all that it seems to be.

This option essentially enables you to take already created WordPerfect documents and convert them to raw XML, based roughly on the Docbook 4.2 specification. Unfortunately, the conversion is quite rough, and in addition, there is no way to open the converted XML documents and immediately create layout options. That's why this topic is included under Advanced XML Topics. If you want to create usable XML documents, you're better off doing so using XML templates.

Nevertheless, if you need to convert existing documents to XML so that someone else can work with the resulting raw XML content, these are the steps:

1. Open an existing .wpd file into WordPerfect.
2. Choose File, Publish To, XML. WordPerfect displays the Publish to XML dialog box (see Figure W3.16).

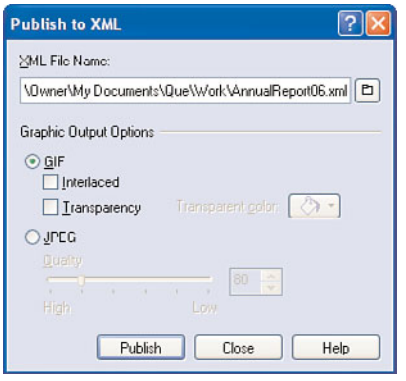

Figure W3.16
The Publish to XML feature enables you to quickly convert existing WordPerfect documents to raw XML, without any layout information.

3. By default, WordPerfect converts the document using the same filename, but with an .XML extension. Change the filename if you want.
4. If the document contains graphic images, you can specify how these are to be converted.
5. Click Publish to convert the document to XML content.

TROUBLESHOOTING

CRASH

While working with the XML Editor, it sometimes crashes for no apparent reason.

Unfortunately, that is the nature of WordPerfect's XML Editor beast. You'll often find that if something you're working with crashes, it will do so over and over again. You can try two things.

First, make sure you save your projects early and often. Press Ctrl+S regularly to save your work, so you won't lose it should the XML Editor crash.

Second, try exiting WordPerfect and Windows altogether and starting them again. Help the editor forget its crashes and perhaps it will work better for you.

CAN'T VALIDATE

When I try to save my XML project, I sometimes come up with validation errors. Should I save anyway?

You can certainly save your documents with its errors. However, before you share the document with others, you should be sure to resolve any validation errors.

Remember that errors can be related to structure or syntax, and thus these are not well formed. Errors can also involve undefined or misused elements or tags, in which case the code is not valid. Although it can be difficult to figure out why the document does not validate, take the time to make sure your document is valid.

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